Position Management: Utilities

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Utilities

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Create Forecast Positions - HRS6285

Position Management > Utilities > Create Forecast Positions

This utility allows the user to create new forecast position records based on existing position records.

If updating tables, create an export using Export PMIS Tables prior to using this utility.

Create forecast positions:

❏ Use the following options to create forecast positions:

Note: By default, all fields on this page are selected. You can clear a selected field by unselecting the individual check box.

- **Include Proposed Positions**
- **More Forecast Conversion Actual Payments to Position Max Payments (Also includes remaining payments if Position occupied)**
- **Move Forecast Conversion Actual Payments to Supplement Max Payments**
- **Reset Supplement Amounts based on Extra Duty code Table Default Amount**
- **Move Forecast Conversion Max Days to Supplement Max Days**
- **Move Supplement Max Days to Supplement Extra Days (occupied only)**
- **Move Supplement Max Payments to Supplement Remaining Payments**

❏ Click **Execute** to execute the process.

Notes:

- All positions and supplement positions are processed through the forecast conversion tables in order to create the new forecast position records with the associated distributions.
- If the **Recalculate** field is selected for a supplement position, and the position is not based on a regular position, the table amount for the extra duty is applied to the position record. If the **Recalculate** field is not selected, the salary amount in the supplement position is not changed.
- The school year value for the new position records is based on the value displayed in the **Next Year** field on the District Administration > Options > PMIS District Options page.
- If the salary concept is different in the current and next year job tables, positions with that job are not processed.
- A warning message is displayed if a first pay date/calendar code, or an extra duty code does not exist for a position in the forecast conversion tables; however, the forecast position record will still be created for the position.

> - A warning message is displayed if an employee has two or more regular positions that exceed 100% of the day and the LEA does not have the **Ignore % of Day** field selected on those positions. This warning does not apply to supplement positions.

❑ Under Processing Reports, the following reports are available:

- Error Listing
- Create Forecast Positions Report

❑ Select a report:

- Select the check box next to the individual report name.
- Click **Select All** to select all reports.
- Click **Unselect All** to clear all selections so that no reports are selected.

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

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

❑ Click **Process** to proceed. You are prompted to create a backup.

❑ Click **Cancel** to return to the Create Forecast Positions page without creating any forecast positions.

Export PMIS Tables - HRS7100

Position Management > Utilities > Export PMIS Tables

This utility is used to export current and next year position management tables for all pay frequencies including PMIS District Options. The export includes active/inactive positions and supplemental positions.

You can use the Position Management > Utilities > Import PMIS Tables page to import the tables.

Note: If data is changed after the export and then imported, those changes are not included.

Export position management tables:

Field	Description
Export File Name	This field is preset and display only. The export file name has the format dbcccddd_PMIS_mmddyyyy.rsf, where cccddd is the county-district number, PMIS indicates position management, and mmddyyyy is the current date.
Enter the Password to be used for the Archive	Type a password for the exported file.

❑ Click **Execute**. The tables are exported and a message is displayed indicating that the export process was completed successfully.

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~~HIDEPAGE~~

Import PMIS Tables - HRS7100

Position Management > Utilities > Import PMIS Tables

This utility is used to import position management tables that were previously exported using the Position Management > Utilities > Export PMIS Tables page.

When the Position Management import is complete, all records (regardless of pay frequency and current/next year flag) are imported.

Note: If data is changed after the export and then imported, those changes are not included.

Import position management tables:

❑ Click **Choose File**. Locate and select the folder on your computer or network and click **Open**. The file name is displayed.

❑ Click **Cancel** to close the dialog box without selecting a file.

Enter the Password used for the Archive	Type a required password for the exported file.

❑ Click **Execute** to start the import function.

- A message is displayed indicating that you are about to import position management tables and confirming that you want to continue.
- Click **Yes** to continue the import. Or, click **No** to cancel the import.

A message is displayed indicating that the import process completed successfully. Click **OK**.

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Import Position Records - HRS7100

Position Management > Utilities > Import Position Records

This page is used to import position records or distribution records into the position management tables. When importing position records, ensure the payroll frequency of the archived file is the same as that of the logged-on payroll frequency.

Notes:

If importing current year records, you must be logged on to a current year pay frequency.

If importing forecast records, you must be logged on to a next year pay frequency.

Position Records File Layout

Review the Checklist - Import Position Data to PMIS for additional information.

Import position records:

❏ Under **Record Type**, select one of the following:

- **Position Records**
- **Distribution Records**

❏ Click **Choose File**. Locate and select the file on your computer or network, and click **Open**. The file name is displayed next to **Choose File**.

❏ Click **Execute** to start the import function. A preview report is displayed. Review the report.

❏ Click **Continue** to continue the process. Or, click **Cancel** to return to the Import Position Records page.

❏ Click **Process** to proceed.

A message is displayed indicating that the import process completed successfully. Click **OK**.

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# Mass Delete Forecast Positions - HRS6285

Position Management > Utilities > Mass Delete Forecast Positions

This utility allows you to delete all forecast records at one time.

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

Create an export using Export PMIS Tables prior to using this utility.

Modify a record:

Field	Description
Select Positions only (P), Supplements only (S) or blank for ALL	Select an option.
Select Position Statuses or blank for ALL	Type the position statuses, separating multiple position statuses with a comma but no space (e.g., A,I). Or, click ⋮ to search for position statuses. Otherwise, leave blank to use all position statuses.
Select Position School Years or blank for ALL	Type the position school years, separating multiple position school years with a comma but no space (e.g., 2014,2015). Or, click ⋮ to search for position school years. Otherwise, leave blank to use all position school years.
Select First Pay Date Codes or blank for ALL	Type the pay date codes, separating multiple pay date codes with a comma but no space (e.g., NY4,NY6). Or, click ⋮ to search for pay date codes. Otherwise, leave blank to use all pay date codes.
Select Extra Duty Codes or blank for ALL	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.
Select Positions or blank for ALL (Includes ALL billets for selected positions)	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.
Select Positions/Billets or blank for ALL	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.
Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions)	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.
Select Supplement Positions/Billets or blank for ALL	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 execute the process.

The following reports are available:

- Mass Delete Forecast Positions Process Error Listing
- Mass Delete Forecast Positions by Employee Name
- Mass Delete Forecast Positions by Campus
- Mass Delete Forecast Positions by Position/Billet

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

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

❏ Click **Process** to process the records. You are prompted to create a backup.

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

❏ Click **Cancel** to return to the Mass Delete Forecast Positions page without processing.

Mass Delete PMIS History - HRS6285

Position Management > Utilities > Mass Delete PMIS History

This utility allows you to delete all PMIS history records for a selected school year at one time.

Create an export using Export PMIS Tables prior to using this utility.

Delete PMIS history records:

Field	Description
Select School Year	Type the four-digit school year for which you want to delete PMIS history records.

Note: You must enter a prior school year. The value cannot be the current school year (i.e., the value in the **Current Year** field on the District Administration > Options > Position Management page).

❑ Click **Execute** to process the deletion of records. You are prompted to create a backup.

After the export process is complete, the actual update is done. If the update is successful, a message is displayed indicating that the mass delete of PMIS history records was processed successfully.

Mass Update Forecast Using First Pay Date Codes - HRS6280

Position Management > Utilities > Mass Update Forecast Using First Pay Date Codes

This utility is used to update position records based on the first pay date code and the calendar code for forecast records. For example, this utility could be used when you need to move a group of 13-month teachers to a regular group of 12-month teachers.

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

This utility is for forecast records only.

Create an export using Export PMIS Tables prior to using this utility.

Mass update forecast records using first pay date codes:

The following fields are display only:

- The **First Pay Dt Cd** indicates the code for the first pay date.
- The **Cal Cd** indicates the two-digit locally assigned calendar code.
- The **Extra Duty Cd** indicates the two-digit extra duty code of the additional job assignment, if any.
- The **First Pay Date** indicates the first pay date in the MMDDYYYY format (based on the first pay date calendar code).
- The **Begin Dt** indicates the calendar beginning date in the MMDDYYYY format.
- The **End Dt** indicates the calendar end date in the MMDDYYYY format.
- The **Payoff Dt** indicates the contract payoff date in the MMDDYYYY format.
- The **Max Days** indicates the maximum number of days.
- The **Nbr Days Off** indicates the number of days an employee is scheduled to work but did not.
- The **Actual Days** indicates the number of days actually worked.
- The **Actual Pymnts** indicates the number of pay dates for the calendar.
- In the **To First Pay Dt Cd** field, type a first pay date code, or click ⌄ to select a new first pay date code from a list. The field can be a maximum of three characters.
- In the **To Cal Cd** field, type the calendar code, or click ⌄ to select a new calendar code from a list. The field can be a maximum of two characters.

❏ Click **Execute** to execute the process.

The following reports are available:

- Mass Update Using First Pay Date Codes Process Error Listing
- Mass Update Forecast Positions by Employee Name
- Mass Update Forecast Positions by First Pay Date Code
- Mass Update Forecast Positions by Campus

❑ Click **Select All** to select all reports. Or, click **Unselect All** to clear all check boxes so that no reports are selected.

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

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

❑ Click **Process** to mass update forecast records using first pay date codes. You are prompted to create a backup.

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

Move Forecast to CYR Position and Payroll - HRS6260

Position Management > Utilities > Move Forecast to CYR Position and Payroll

This utility is used to move payroll and position forecast records to the current year PMIS with the same information that is set up in the next year PMIS records.

It also updates fields on the Employment Info, Pay Info, Job Info, and Distribution maintenance tabs.

This utility updates the **Percent Day Employed** field on the Personnel > Maintenance > Employment Info tab.

When moving position records from forecast to current, ensure that the **Accept Changes** field is not selected. The position records cannot be moved if the **Accept Changes** field is selected.

When running a simulation, the **Accept Changes** field must be selected. And, if the simulation is run with the **Update Forecast** field set to *Yes*, the **Accept Changes** field is cleared after the simulation is run.

Create an export using Export PMIS Tables prior to using this utility.

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

Notes: If you have not run the simulation live, a list of errors is displayed upon running this utility. The move forecast to current process does the following:

- Creates two historical records, an ending record for the position in the current year and a beginning record for the position in forecast.
- Updates the current year position records with the data in forecast.
- Deletes all current year job and distribution records and replaces it with the data from forecast.

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 current year:

Select Pay Frequency	Click ⌄ to select the pay frequency where you want to move to the current year. This is a required field.
Include Vacant Supplements	Select to include the vacant supplement positions. **Recommendation**: Do not select this field unless it is your final move.
Validate Accounts against General Ledger	This field is selected by default. Clear this field to not validate the accounts against the general ledger. **Recommendation**: Select this field if you are doing your first test move. By doing so, the appropriate errors are generated to inform you of incorrect account codes in PMIS. If not selected, those account codes are moved to Payroll if each account component is valid.
Update TRS Year Flag	Select to update the **TRS Year** field on the Payroll > Staff/Job Pay Data > Job Info tab. **Recommendation**: Select this field if the employees being moved will receive a contract payment prior to the first pay date of the new school year (i.e., July and August starts).
Update Workers' Comp Annual and Remaining Payments	Select to update the **WC Ann Pymts** and **WC Remain** fields on the Payroll > Staff/Job Pay Data > Job Info tab. The **WC Ann Pymts** field indicates the number of annual workers' compensation payments for the contract period and the **WC Remain** field indicates the number of remaining workers' compensation payments to be made during the contract period.
Add Additional Workers' Comp Payments	Type the number of additional workers' compensation payments. The field accepts any value between 0-9. This field is helpful as it can be difficult to identify which months have a third payroll for the biweekly frequency. You can use this field to add one or two to the contract months times two.
Select State Minimum Salary Table (CYR/NYR)	Click ⋮ to select the current year or next year. This is a required field. This selection determines which salary table is referenced when calculating the state foundation salary.
Select First Pay Date Codes or blank for ALL	Select the first pay date codes that begin their new contract payout. 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.
Include Extra Duty	Select to include extra duty in the process. If not selected, no extra duty will be processed even if extra duty codes are selected.

Select Extra Duty Codes or blank for ALL	Select all of the supplements as only those supplements that are tied to an employee being moved based on the first pay date code will be selected. You can select a supplement even if it is tied to an employee who you do not want to pay yet. 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.
Select Positions or blank for ALL (Includes ALL billets for selected positions Blank for ALL not processed when Positions/Billets selected)	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.
Select Positions/Billets or blank for ALL	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.
Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions Blank for ALL not processed when Supplements/Billets selected)	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.
Select Supplement Positions/Billets or blank for ALL	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.
Clear Job Years	Select to reset the job years to the default value (blank) on the employee's job record. If not selected and the employee's forecast position job code is the same as the current year job master record, then the new job record is populated with the values from the current year job master record.
Clear Job Weekly Hours Scheduled	Select to reset the weekly hours scheduled to the default value (blank) on the employee's job record. If not selected and the employee's forecast position job code is the same as the current year job master record, then the new job record is populated with the values from the current year job master record.

☐ Click **Execute** to execute the process.

The following reports are available:

- Move Forecast Process Error Listing Important errors

Error Message	Description
Warning: The employee has Contract Balance amounts not equal to zero for current jobs.	The employee has not been paid off by payroll.
Failure: Position Accept Changes Flag set to Y	The position will not be moved to the current/payroll.

Error Message	Description
Failure: Emp Nbr must have one position declared as primary.	The error does not necessarily reference the **Primary Job** field on the position. If an employee has a regular position and a supplement position, but there is an error that causes the primary position to fail, this message often indicates that there is only a supplement position to be moved. It is recommended to review and correct any errors that begin below this message about primary positions. After making those corrections, run the process again. This may resolve the primary job errors. This error also occurs when calendars have not been copied to the current year.
Warning: Emp Nbr has multiple supplement positions for the same job; however, one or more of the following do not match: Campus ID, Dept, TRS Status Code, FTE Units, Incr Elig, Max Paymts, FICA Elig, Unemp Elig, EEOC, Workers Comp, Supplement Extra Days or Category Cd. The values from lowest Supplement Position Number/Billet may be used if new rows are inserted for the Pay Info and Job Info tabs.	This error indicates that the fields on the Payroll > Tables > Salaries > Extra Duty tab do not match those selected on a supplemental position. Use the Position Management > Inquiry > PMIS Staff Inquiry to determine the Position Number and Billet for any supplemental positions for the employee. Then, use the Position Management > Maintenance > PMIS Supplement Modify page to retrieve the position and billet and compare the fields on the position to the Payroll > Tables > Salary > Extra Duty tab for the extra duty number on the supplement. For example, in some cases the W/C code on the position may not match the W/C code on the table. Or, the **Exp 373** field on the position may be selected, but the **Exp 373** on the table for that extra duty code may not be selected. Either the table or the position needs to be updated so that they both match. If changes are made to the Extra Duty table, it is necessary to move the table to the current year payroll before proceeding.

- Update CYR Positions From Forecast - The error report lists any funds that need to be set up in the Finance tables.
- Update CYR Payroll From Forecast by Employee Name
- Update CYR Payroll From Forecast by Campus ID

❏ Click **Select All** to select all reports. Or, click **Unselect All** to clear all check boxes so that no reports are selected.

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

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

❏ Click **Process** to move forecast records to the current year. You are prompted to create an export.

- Click **Yes** to export payroll tables to internal database tables.
- Click **No** to continue the process without creating an export.

A message is displayed indicating that the update and export were processed successfully. The internal export is now listed on the Payroll > Utilities > Import HR Tables from Database Tables page and can be selected to be imported.

❏ Click **Cancel** to return to the Move Forecast to CYR Position and Payroll page without moving the forecast records to the current year.

Move Forecast to NYR Payroll - HRS6270

Position Management > Utilities > Move Forecast to NYR Payroll

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.

This utility does not update the **Percent Day Employed** field on the Personnel > Maintenance > 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:

Field	Description
Select Pay Frequency	By default, this field is set to the year in which you are logged on. Click ⌄ to select a different pay frequency. This is a required field.
Update TRS Year Flag	By default, this field 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.
Select First Pay Date Codes or blank for ALL	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.

Field	Description
Include Extra Duty	Select to include extra duty in the process. If not selected, no extra duty will be processed even if extra duty codes are selected.
Select Extra Duty Codes or blank for ALL	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.
Select Positions or blank for ALL (Includes ALL billets for selected positions Blank for ALL not processed when Positions/Billets selected)	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.
Select Positions/Billets or blank for ALL	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.
Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions Blank for ALL not processed when Supplements/Billets selected)	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.
Select Supplement Positions/Billets or blank for ALL	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 execute the process.

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

❏ Click **Select All** to select all reports. Or, click **Unselect All** to clear all check boxes so that no reports are selected.

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

❏ 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. You are prompted to create an export.

- Click **Yes** to export next year payroll tables to internal database tables.
- Click **No** to continue the process without creating an export.

A message is displayed indicating that the update and export were processed successfully. The internal export is now listed on the Payroll > Utilities > Import HR Tables from Database Tables page and can be selected to be imported.

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

Retro Pay Processing - HRS6280

Position Management > Utilities > Retro Pay Processing

This utility is used to perform retro pay processing. You must be logged on to a next year pay frequency to access this utility.

Create an export using Export PMIS Tables prior to using this utility.

[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).

Process retro pay:

Field	Description
Select Pay Frequency	Click ⌄ to select the pay frequency that you wish to move to current year. This is a required field.
Validate Accounts against General Ledger	By default, this field is selected. Clear **Validate Accounts against General Ledger** to not validate the accounts against the general ledger.
Select First Pay Date Codes	Type the pay date codes, separating multiple pay date codes with a comma but no space (e.g., NY4,NY6). Or, click ⋮ to search for pay date codes.
Include Extra Duty	Select to include extra duty in the process. If not selected, no extra duty will be processed even if extra duty codes are selected.
Select Extra Duty Codes or blank for ALL	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.
Select Positions or blank for ALL (Includes ALL billets for selected positions)	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.
Select Positions/Billets or blank for ALL	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.

Field	Description
Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions)	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.
Select Supplement Positions/Billets or blank for ALL	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.
Select Extra Duty Code for Position Retro Pay	Type the extra duty code (e.g., 11). Or, click ⋮ to search for an extra duty code.
Select Extra Duty Code for S-Type Supplement Position Retro Pay	Type the S-type extra duty code (e.g., ST). Or, click ⋮ to search for an S-type extra duty code.
Select Extra Duty Code for B-Type Supplement Position Retro Pay	Type the B-type extra duty code (e.g., BT). Or, click ⋮ to search for a B-type extra duty code.
Select Extra Duty Code for T-Type Supplement Position Retro Pay	Type the T-type extra duty code (e.g., TT). Or, click ⋮ to search for a T-type extra duty code.
Select the Pay date to be used for Payroll Transmittals	Type the pay date code, or click ⋮ to search for pay date codes. If the S**elect the Pay date to be used for Payroll Transmittals** field is blank, the next available pay date for the selected pay frequency will be used.

❑ Click **Execute** to execute the process.

The following reports are available:

- Retro Pay Process Error Listing
- Retro Pay - Update CYR Positions From Forecast
- Retro Pay - Update CYR Payroll From Forecast by Employee Name
- Retro Pay - Update CYR Payroll From Forecast by Campus ID
- Retro Pay Processing Payroll Transmittals

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

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

❑ Click **Process** to proceed. You are prompted to create a backup.

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

❑ Click **Cancel** to return to the Retro Pay Processing page without processing.

Salary Simulation

Use the Table of Contents to access a page.

Deductions - HRS6250

Position Management > Utilities > Salary Simulation > Deductions

This tab is used to designate estimated employee and employer annual amounts for deductions. PMIS does not use the next year Staff Job/Pay Data; therefore, employee deductions are not available for budgeting. Vacant positions can also be included in the simulation.

The intent of the employee amount is to have an annual estimated value of deductions that are subject to a Cafeteria Plan 125 that affects FICA/Medicare tax calculations for budgeting purposes. The employer amount is intended for those deductions where employer contribution needs to be budgeted. The simulation looks at the current year payroll to detect which employees have that deduction code, and takes the amount reflected in the **Emp Amt** field on this tab and reduces the employee annual gross on the simulation by that amount for those employees who occupy positions in the next year PMIS to determine the amount of FICA/Medicare that needs to be calculated for Budget. This field is optional; however, leaving it blank will over budget for FICA and Medicare, which may be preferred by some LEAs.

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

Designate or add a deduction code:

Field	Description
Simulation Name	Type the name of a simulation or click ⋮ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⋮ to select the simulation description from a list. The field can be a maximum of 30 characters.

❑ Click **Retrieve**.

Simulation Name	Display only and indicates the simulation name as entered in the **Simulation Name** field at the top of the page.
Description	Display only and indicates the simulation description as entered in the **Simulation Description** field at the top of the page.

❑ Click **Deductions** to select a fund from the Deductions [lookup](#).

❑ Click **+Add** to add a row.

Deduction Code	Type a three-digit code identifying the deduction. This code must exist in the Deduction Code table.
Type	Indicates the two-character code identifying the deduction and is automatically populated based the **Deduction Code** field.
Long Description	Indicates the long name that best describes the deduction code and is automatically populated based on the **Deduction Code** field.

Emp Amt	Type the annual amount of the contribution by the employee with that deduction.
Emplr Amt	Type the annual amount of the contribution by the LEA for the employee with that deduction.
Apply to Vacant Position	Select to apply the employer amount to vacant positions included in the simulation. **Note**: If your TRS Active-Care is split between more than one payroll deduction code, only select this field for one of the deduction codes. For example, if you have four TRS Active-Care codes and each one has an annual amount of $2700 for the employer contribution and you select this field for all four codes, then each vacant position in your reports will reflect a budget amount of $10,800 for health insurance.

❑ Click **Save**.

Delete Simulations - HRS6250

Position Management > Utilities > Salary Simulation > Delete Simulations

This tab is used to delete simulation tables. The Delete Simulations tab is not a required step in the simulation process.

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

Prior to using this utility, create an export using the Position Management > Utilities > Export PMIS Tables page.

Delete existing simulation tables:

❏ All available simulations are displayed on the left side of the page. Use the arrow buttons to select the simulations to be updated.

⟶ - Click to move selected entries from the left side to the right side of the page.

⟹ - Click to move all entries from the left side to the right side of the page.

⟵ - Click to move selected entries from the right side to the left side of the page.

⟸ - Click to move all entries from the right side to the left side of the page.

❏ Select the simulations to be deleted.

❏ Click **Execute** to delete the selected simulation(s).

Extra Duty - HRS6250

Position Management > Utilities > Salary Simulation > Extra Duty

This tab is used to automatically reference the correct extra duty salary for employees based on their extra duty codes. This table can be utilized to alter simulations for those pay rates for part-time functions required at each campus or LEA (e.g., Cheerleader Sponsor, and UIL events).

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

Set up extra duty salary data:

Field	Description
Simulation Name	Type the name of a simulation or click ⁞ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⁞ to select the simulation description from a list. The field can be a maximum of 30 characters.

❑ Under **Records**:

Sim Name	Displays the simulation name as entered in the **Simulation Name** field at the top of the page.
Descr	Displays the simulation description as entered in the **Simulation Description** field at the top of the page.
Extra Duty Cd	Type the appropriate extra duty code for the current simulation, or click ⁞ to select the extra duty code from a list.

❑ Click **Retrieve**. The extra duty code data is displayed.

❑ Click **Extra Duty** to select an extra duty code from the Extra Duty lookup. Or, create new entries to be included in the simulation phase.

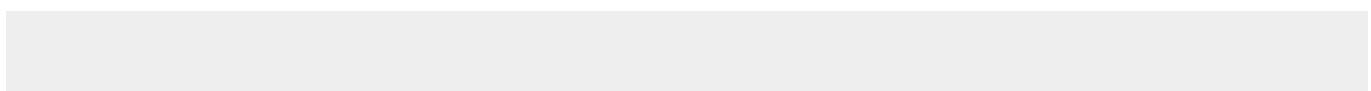❑ Under **Modify**, select either of the following criteria to modify extra duty salaries:

- **By Percent**
- **By Dollar Amt**

❑ Under **Salary**:

Amount	Type the dollar or percentage value to increase a salary. The dollar amount can be a maximum of six digits (e.g., 9999.99).

❑ Click **Default** to apply the amount entered in the **Amount** field to each salary.

Note: Only the rows without a value in the **% Increase** or **Amount Increase** columns are affected when applying the default values.

❏ Click **+Add** to add a row.

Extra Duty Cd	Type the extra duty code. The field can be a maximum of two characters.
Description	Type the name that best describes the code. The field can be a maximum of 16 characters.
Account Code	An edit mask allows you to type the full 20-digit account number, mask the organization code, or mask the whole account number. If the organization code is masked, when extra duty is assigned to the employee, the organization code from the employee record would complete the code. If the entire code is masked, when extra duty is assigned to the employee, a complete account code must be entered on the distribution record for the employee.
Activity	Click ˅ to select a PEIMS activity code and corresponding description.
Wholly Sep	Click ˅ to select whether the extra duty salary is subject to the Above State Minimum Salary Calculations of the TRS 373 Report.
Exp 373	Click ˅ to select whether the amount is to be distributed for the above state base.
Acct Type	Click ˅ to select an account type that best identifies the type of salary. The **Acct Type** field is a required field and must be populated to save entries in the table.
W/C Cd	Click ˅ to select the workers' compensation code.
Incl Suppl Dock Rate	Display only and indicates if the supplemental extra duty amount is included in the simulation or not.

The **Amount** field is populated with the salary amount authorized for this extra duty assignment from the next year extra duty table.

Note: Each row can only be changed by a percent or dollar amount, not both, and if a row previously had a value entered in the **Amount Increase** column, and a value is entered in the **% Increase** column, the **Amount Increase** column changes to zero.

% Increase	Type the percentage of the increase.
Amount Increase	Type the dollar amount of the increase.
New Amount	This field is calculated by the system.
Suppl Extra Days	If the extra duty will be used for extra days that the employee works, type the number of additional days to be used for the simulation. If this field is updated, the amount for any extra days worked is calculated. And, if the supplemental position is tied to the employee's regular position, the amount is calculated based on the daily rate of the regular position.

❏ Click **Refresh Totals** to recalculate the new amounts when a new amount or percent is entered.

❏ Click **Save**.

First Pay Date Codes - HRS6250

Position Management > Utilities > Salary Simulation > First Pay Date Codes

> This tab is used to designate positions to be included in the simulation based on first pay date codes.
>
> You must be logged on to a next year pay frequency to access this utility.

Set up first pay date codes:

Field	Description
Simulation Name	Type the name of a simulation or click ⋮ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⋮ to select the simulation description from a list. The field can be a maximum of 30 characters.

❏ Click **Retrieve**. The simulation is retrieved.

Simulation Name	The simulation name is displayed.
Simulation Description	The description of the current simulation is displayed.

❏ Click **First Pay Dt Cds** to select a fund from the First Pay Date Codes lookup.

❏ Click **+Add** to add a row.

First Pay Date Code	Type a unique pay date code. The field can be a maximum of three characters.
Date of Pay	This field is display only and indicates the starting pay date.

❏ Click **Save**.

Fund/Fiscal Year Exclusions - HRS6250

Position Management > Utilities > Salary Simulation > Fund/Fiscal Year Exclusions

This tab allows you to designate which funds should not be included in updates to budget (if **Update Budget** is selected on the Position Management > Utilities > Salary Simulation > Simulation Options tab). If no funds are selected, all funds are available for the update.

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

Create an exclusion:

Field	Description
Simulation Name	Type the name of a simulation or click ⁞ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⁞ to select the simulation description from a list. The field can be a maximum of 30 characters.

❑ Click **Retrieve**. The simulation is retrieved.

Simulation Name	The simulation name is displayed.
Simulation Description	The description of the current simulation is displayed.

❑ Click **Budget Funds** to select a fund from the Budget Funds/Fiscal Years lookup.

❑ Click **+Add** to add a row.

Fund/Fiscal Years	Type the fund code and the fiscal year. The fund code can be any digit between 101-999, and the fiscal year is a one-digit code that is the last digit in the fiscal (school) year.

❑ Click **Save**.

Create an exclusion:

Field	Description
Simulation Name	Type the name of a simulation or click ⁞ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⁞ to select the simulation description from a list. The field can be a maximum of 30 characters.

❑ Click **Retrieve**. The simulation is retrieved.

Simulation Name	The simulation name is displayed.
Simulation Description	The description of the current simulation is displayed.

❏ Click **Budget Funds** to select a fund from the Budget Funds/Fiscal Years lookup.

❏ Click **+Add** to add a row.

Fund/Fiscal Years	Type the fund code and the fiscal year. The fund code can be any digit between 101-999, and the fiscal year is a one-digit code that is the last digit in the fiscal (school) year.

❏ Click **Save**.

Hourly/Daily - HRS6250

Position Management > Utilities > Salary Simulation > Hourly/Daily

This tab is used to automatically reference the correct hourly/daily salary for positions, based on their pay grade, pay step, max days employed, and local schedule code. This table can then be utilized to alter simulations for those positions, such as teachers, paraprofessionals, maintenance, bus drivers, and other jobs as maintained by the district.

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

Set up hourly/daily salary data:

Field	Description
Simulation Name	Type the name of a simulation or click ⁝ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⁝ to select the simulation description from a list. The field can be a maximum of 30 characters.

❏ Click **Retrieve**. The hourly/daily salary data is displayed.

❏ Under **Records**:

Field	Description
Sim Name	Displays the simulation name as entered in the **Simulation Name** field at the top of the page.
Descr	This field is populated automatically with the simulation description as entered on the Simulation Options tab.
Pay Grade	Click ⁝ to select the appropriate pay grade for the current simulation. This option limits your selection. **Note**: In addition, you can click the **Hourly/Daily** button to retrieve and select multiple pay grades from the hourly/daily table, or create new entries to be included in the simulation phase.

❏ Click **Retrieve**. The hourly/daily salary data is displayed.

❏ Under **Modify**, select either of the following criteria to modify hourly/daily salaries:

- **By Percent**
- **By Dollar Amt**

❏ Under **Salary**:

Amount	Type the dollar or percentage value to increase a salary. The dollar amount can be a maximum of six digits (e.g., 9999.99).

❑ Click **Default** to apply the amount entered in the **Amount** field to each salary.

> **Note**: Only those rows that have no value in the **% Increase** or **Amount Increase** columns are affected when applying the default values.

❑ Click **+Add** to add a row.

Pay Grade	Type the code for the pay grade. The field can be a maximum of three characters.
Pay Step	Type the code for the salary level within the indicated pay grade. The field can be a maximum of two characters.
Rate Type	This field is populated by the system: If the **Hrs Per Day** field is left blank, the rate type is set to the daily rate. If the **Hrs Per Day** field contains hours, the rate type changes to hourly.
Pay Type	Displays the type of pay for the selected simulation.
Hrs Per Day	Indicates how the rate is paid. If hours are not zero, the rate is considered an hourly rate.
Local Sched	Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed.
Est Ovtm Hrs	Displays the estimated annual number of overtime hours allowed for this pay grade and step.

The system populates the **Amount field** with the hourly/daily salary amount authorized for this pay grade and step from the Hourly/Daily NYR table.

> **Note**: Each row can only be changed by a percent or dollar amount, not both, and if a row previously had a value entered in the **Amount Increase** column, and now a value is entered in the **% Increase** column, the **Amount Increase** column changes to zero.

% Increase	Type the percentage of the increase.
Amount Increase	Type the dollar amount of the increase.
New Amount	This field is calculated by the system.

❑ Click **Refresh Totals** to recalculate the new amounts when a new amount or percent is entered.

❑ Click **Save**.

Local Annual - HRS6250

Position Management > Utilities > Salary Simulation > Local Annual

This tab is used to automatically reference the correct annual salary for employees, based on their pay grade, pay step, max days employed, and local schedule code. This table can be utilized to alter simulations for those employees, such as teaching staff, whose pay is based on an annual amount with step increases for years of service.

Set up local annual salary data:

Field	Description
Simulation Name	Type the name of a simulation or click ⋮ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⋮ to select the simulation description from a list. The field can be a maximum of 30 characters.

❏ Under **Records**:

Simulation Name	Display only and indicates the simulation name as entered in the **Simulation Name** field at the top of the page.
Description	Display only and indicates the simulation description as entered in the **Simulation Description** field at the top of the page.
Pay Grade	Click ⋮ to select the appropriate pay grade for the current simulation. This option limits your selection.
Local Annual	Click to retrieve and select multiple pay grades from the annual salary table, or create new entries to be included in the simulation phase.

❏ Click **Retrieve**. The local annual salary data is displayed.

❏ Under **Modify**, select either of the following criteria to modify local annual salaries:

- **By Percent**
- **By Dollar Amt**

❏ Under **Salary**:

Amount	Type the dollar or percentage value to increase a salary. The dollar amount can be a maximum of six digits (e.g., 9999.99).

❏ Click **Default** to apply the amount entered in the **Amount** field to each salary.

Note: Only those rows that have no value in the **% Increase** or **Amount Increase** columns are affected when applying the default values.

❏ Click **+Add** to add a row.

> **Note**: When adding a new row with **+Add**, the same pay grade, pay step, local schedule, and maximum days employed must exist in the NYR Local Annual Salary Table, or the record cannot be saved.

Pay Grade	Type the code for the pay grade. The field can be a maximum of three characters.
Pay Step	Type the code for the salary level within the indicated pay grade. The field can be a maximum of two characters.
Max Days Employed	Type the maximum number of days worked at the indicated pay grade and pay step. The field can be a maximum of three characters.
Local Sched	Type the optional, locally assigned, single-character code that is used to indicate the separate pay schedules for professional and support staff with the same pay grade, pay step, and maximum number of days employed.

The system populates the **Annual Amt** field with the annual salary for this pay grade and step from the Local Annual NYR table.

> **Note**: Each row can only be changed by a percent or dollar amount, not both, and if a row previously had a value entered in the **Amount Increase** column, and now a value is entered in the **% Increase** column, the **Amount Increase** column changes to zero.

% Increase	Type the percentage of the increase.
Amount Increase	Type the dollar amount of the increase.
New Amount	This field is calculated by the system.

❏ Click **Refresh Totals** to recalculate the new amounts when a new amount or percent is entered.

❏ Click **Save**.

Midpoint - HRS6250

***Position Management > Utilities > Salary Simulation > Midpoint***

This tab is used to manage the pay rates for hourly, noncontract employees, and contract employees not covered under the Annual or Hourly/Daily salary tables.

Midpoint Salary Schedule

Set up midpoint salary data:

Field	Description
Simulation Name	Type the name of a simulation or click ⋮ to select the simulation name from a list.
Simulation Description	Type a description of the current simulation or click ⋮ to select the simulation description from a list. The field can be a maximum of 30 characters.

❑ Under **Records**:

Sim Name	Display only and indicates the simulation name as entered in the **Simulation Name** field at the top of the page.
Descr	Display only and indicates the simulation description as entered in the **Simulation Description** field at the top of the page.
Pay Grade	Click ⌄ to select the appropriate pay grade for the current simulation. This option will limit your selection. **Note**: In addition, you can click the **Midpoint** button to retrieve and select multiple pay grades from the midpoint table, or create new entries to be included in the simulation phase.

❑ Click **Midpoint** to retrieve and select multiple pay grades from the midpoint table, or create new entries to be included in the simulation phase.

❑ Click **Retrieve**. The midpoint salary data is displayed.

❑ Under **Modify**, select either of the following criteria to modify midpoint salaries:

- **By Percent**
- **By Dollar Amt**

❑ Under **Salary**:

Minimum	Type the percentage or dollar amount each row will increase by.
Maximum	Type the percentage or dollar amount each row will increase by.
Midpoint	Type the percentage or dollar amount each row will increase by.

Max Pct Pay Inc	Type the maximum percentage allowable for the simulation.
Midpt Pct Pay Inc	Type the maximum midpoint percentage allowable for the simulation.

❑ Click **Default** to apply the amounts entered in the **Minimum**, **Maximum**, and **Midpoint** fields to each row.

> **Note**: Only those rows that have no value in the **% Increase** or **Amt Increase** columns are affected when applying the default values.

❑ Click **+Add** to add a row.

Pay Grade	Type the locally assigned, three-character code for the pay grade.
Pay Type	Click ⌄ to select a of pay type code.
Hours	Type the number of hours authorized for this pay grade. When pay types 1, 2, and 4 are calculated as daily rates, the **Hours** field is left blank. When pay type 3 is calculated on an hourly pay rate, the **Hours** field requires a value.

The system populates the **Minimum** field with the lowest pay rate for this pay grade/pay type from the Midpoint NYR table.

> **Note**: Each row can only be changed by a percent or dollar amount, not both, and if a row previously had a value entered in the **Amount Increase** column, and now a value is entered in the **% Increase** column, the **Amount Increase** column will change to zero.

% Increase	Type the percentage of the increase.
Amt Increase	Type the dollar amount of the increase.
New Min	This field is calculated by the system.

The system populates the **Maximum** field with the highest pay rate for this pay grade/pay type from the Midpoint NYR table.

% Increase	Type the percentage of the increase.
Amt Increase	Type the dollar amount of the increase.
New Max	This field is calculated by the system.

The system populates the **Midpoint** field with the calculated midpoint pay rate for this pay grade/pay type from the Midpoint NYR table.

% Increase	Type the percentage of the increase.
Amt Increase	Type the dollar amount of the increase.
New Midpoint	This field is calculated by the system.
Max Pct Pay Inc	Type the maximum percentage allowable for the simulation.
Midpt Pct Pay Inc	Type the maximum midpoint percentage allowable for the simulation.

Max Inc/Dec Amt	This field is calculated by the system.
Midpnt Inc/Dec Amt	This field is calculated by the system.

❑ Click **Refresh Totals** to recalculate the new amounts when a new amount or percent is entered.

❑ Click **Save**.

Simulation Options - HRS6250

Position Management > Utilities > Salary Simulation > Simulation Options

The Salary Simulation menu is only available when logged on to a next year pay frequency.

Create an export using Utilities > Export PMIS Tables prior to using this tab.

> This tab is used to create a forecast position salary simulation and to select the parameters associated with the simulation.
>
> The simulation will process for positions where the school year matches the **Next Year** field on the District Administration > Options > Position Management tab and where the accept changes flag is selected for forecast records.
>
> Each simulation will have a unique, user-assigned name and may have various salary types included in the simulation.
>
> When the salary calculations are performed, the program will use the original salary amount from the next year salary table, and then apply the percent or amount change as defined in the associated simulation table for that salary to determine the new salary amount for that pay grade and pay step.
>
> Steps that have a zero percent or amount increase are included in the salary calculations at the rate from the original next year salary table amounts.
>
> Salary Simulations provide budget reports without the need to overlay any employee or position data in the NYR payroll. Reports are available after the simulation calculations have been processed.
>
> If the **Recalculate** field is selected for a supplement position on the Maintenance > PMIS Supplement Modify or PMIS Supplement Admin pages, and the position is not based on a regular position, the salary table amount for the extra duty is applied to the position record. If the **Recalculate** field is not selected, the salary amount in the supplement position is not changed.
>
> **403B FICA Alternative contribution calculations** - PMIS simulation calculations now include 403B FICA Alternative contribution calculations when the A3 deduction type is included on the Deductions tab for the selected simulation. And, the deduction code for the A3 deduction type exists for an employee included in the simulation. The reports will list the account codes and amounts in the annuities column.

Create a simulation:

Field	Description
Simulation Name	Type the name of a simulation or click ⋮ to select the simulation name from a list.

Field	Description
Simulation Description	Type a description of the current simulation or click ⋮ to select the simulation description from a list. The field can be a maximum of 30 characters.

❏ Click **Retrieve**. The simulation is retrieved.

|	
Simulation Name	If retrieving an existing simulation, the simulation name is displayed. If adding a new simulation, type the simulation name.
Simulation Description	The description of the current simulation is displayed. If adding a new simulation, type the new simulation description.
User ID	This field is populated per user per simulation.

❏ Click **Add Simulation** to create a new simulation.

❏ Under **Calculation Options**:

Include Proposed Positions	Click ⌄ to select *Yes* or *No* to budget for the proposed positions to determine if they are affordable. This is a required field.
Include Vacant Supplement Positions	Click ⌄ to select *Yes* or *No* to budget for the vacant supplement positions to determine if they are affordable. This is a required field. **Note**: Forecast always budgets for a vacant regular position.
Increment Pay Steps	Click ⌄ to select *Yes* or *No* to increment the pay steps in the simulation. This is a required field. **Note**: If salaries will be frozen, the salary increase should be set to 0%, and the step salary schedule should be changed by moving the amounts from one step to another.
Maximum Annual Pay Step	Type the two-character code for the highest pay step in your local annual salary schedule. The field is used to identify the correct salary amount on the salary table.
Maximum Hourly/Daily Pay Step	Type the two-character code for the highest pay step in your hourly/daily salary schedule. The field is used to identify the correct salary amount on the salary table.
Increment State Steps	Click ⌄ to select *Yes* or *No* to increment the state steps in the simulation. The state steps automatically max out at 20. This is a required field.
Include TRS On-Behalf Calculations	Click ⌄ to select *Yes* or *No* to include the TRS on-behalf calculations in the simulation. This is a required field.
Expenditure Account for TRS On-Behalf Calculations	Type an account code to be used as an expenditure account for the TRS on behalf calculations. The object code is always 6144 and must be distributed by function so the function must be XX. The LEA can determine other account code components.

For Midpoint Salaries - Basis of Salary Change	Click ⌄ to select one of the following options: *C - Use position hrly/dly rate* - Select to calculate the percentage increase for midpoints on the actual existing rate. This option is used by LEAs that are using a midpoint schedule in place of putting employees on a salary schedule. *T - Use Simulation Mid Inc/Dec Amt* - Select to base the percentage on the midpoint. This option is used by LEAs that follow a midpoint schedule. Select to calculate the percentage increase for midpoints on the actual existing rate. This option is used by LEAs that are using a midpoint schedule in place of putting employees on a salary schedule. This is a required field.
For Midpoint Salaries - Increase Pay Rate to Minimum	Click ⌄ to select *Yes* or *No* to increase or not increase the pay rate to minimum for midpoint salaries. This is a required field. If *Yes* is selected, the pay rate is increased to the minimum amount if it is below the minimum amount, and then the pay rate raise is applied per the simulation. This ensures that employees are not paid less than the minimum. If *No* is selected, the pay rate raise is applied per the simulation, and then the pay rate is raised to the minimum amount if it is still below the minimum amount. [Example](#) **Example 1**: If an employee's current pay rate is $47, the simulation is set up for a 1% increase on midpoint, and the midpoint table amounts are set up as follows: $50 minimum $75 midpoint $100 maximum If *Yes* is selected, the pay rate is updated to $50.75, which is an increase to $50 (the minimum) plus 1% (.75) of $75. If *No* is selected, add 1% (.75) of $75 to the current pay rate of $47, which is below the minimum so the pay rate is updated to $50. **Example 2**: If an employee's pay rate is $49.50, and all of the factors are the same as in example 1: If *Yes* is selected, the employee's new pay rate is $50.75. If *No* is selected, the employee's new pay rate is $50.25.
Include TEA Health Insurance	Click ⌄ to select *Yes* or *No* to include or not include TEA health insurance in the simulation. This is a required field.

☐ Under **Update Options**:

Update for Active Positions Only	Click ⌄ to select one of the following options: *A - Calculate Budget Based on Vacancy Data* *B - Move Actual Amount to Budget Amount* *C - Move Actual Amount to Budget if Actual > Budget* This is a required field.
Update Forecast	Click ⌄ to select *Yes* or *No* to update or not update the forecast in the simulation. Only select *Yes* when you are ready to secure all of the positions and apply the increase and updates to next year positions. This option moves the simulations into the next year positions, and if selected, the pay and state step increase is updated. This is a required field.

Update Budget	Click ⌄ to select one of the following options: *N - Do not update Budget* *I - Increase or add to the amounts in Budget* *R - Replace the amounts in Budget* (This is how next year payroll to next year budget works.) This is a required field.
Update Budget Amount	Click ⌄ to select one of the following options: *R - Recommended Amount* *A - Approved Amount* This is a required field.

❏ Click **Execute** to begin the simulation process.

❏ Under **Calculation Reports**:

- Select the report(s) from the list. Click **Select All** or **Unselect All** to select all of the reports or unselect all reports.
- Click **Generate Reports**. The reports are displayed in the order selected.

❏ Click **Process** to save the data to budget and/or PMIS records based on the **Update Options** selected. You are prompted to create a backup.

Review the report.

❏ Click **Continue** to continue to the next report.

❏ Click **Return** to return to the Calculation Reports page and skip the display of the remaining reports selected.

Duplicate a simulation:

The **Duplicate From Simulation** field and **Duplicate** button are only visible when you click **Add Simulation**.

Duplicate From Simulation	Type the name of a simulation, or click ⌄ to select a simulation name from a list.

❏ Click **Duplicate** to duplicate the simulation.

Delete a simulation:

❏ Click **Delete** to delete the displayed simulation.

Update Salary Tables- HRS6250

Position Management > Utilities > Salary Simulation > Update Salary Tables

This tab is used to select the simulation records to update the next year salary data. All simulations that will be updated in the next year tables need to be updated at one time. Once the update process has been completed, the process is disabled until the Copy CYR Tables to NYR Tables process is completed again.

It is your responsibility to ensure the simulation has not been updated multiple times, causing the salary tables to be incorrect. It is also important to maintain the integrity of the simulation tables to prevent duplicated steps.

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

Update existing salary tables:

❏ All available simulations are displayed on the left side of the page. Use the arrow buttons to select the simulations to be updated.

| → | - Click to move selected entries from the left side to the right side of the page. |

| ⇒ | - Click to move all entries from the left side to the right side of the page. |

| ← | - Click to move selected entries from the right side to the left side of the page. |

| ⇐ | - Click to move all entries from the right side to the left side of the page. |

❏ Click **Execute**.

If any errors are encountered during the process, an error report is displayed. A listing of all duplicates and rows in the simulation that are not listed in the salary table is displayed. All simulation update processes are disabled until you clear the errors.

Review the report.

❏ Click **Continue**.

❏ Click **Cancel** to close the report and return to the Update Salary Tables tab.

If no errors are encountered during the process or you clicked **Continue** from the error report, a report for each of the four salary tables is generated.

❏ Click **Cancel** to return to the Update Salary Tables tab without updating.

❑ Click **Process** to process the update. You are prompted to create a backup.

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

Update Fiscal Year by Fund - HRS6240

Position Management > Utilities > Update Fiscal Year by Fund

This utility is used to select funds that need an updated fiscal year. When updating the fiscal year by fund, ensure the payroll frequency matches that of the logged-on payroll frequency. To update the fiscal year for another payroll frequency (e.g., E - Semimonthly NYR), you must change to that payroll frequency using the Change Payroll Frequency dialog box.

Position distribution records will be updated based on the logged-on pay frequency. For example:

- If you are logged on to a current year pay frequency, current year position management distribution records are incremented for selected funds.
- If logged on to a next year pay frequency, forecast position management records are incremented for selected funds.

Create an export using Export PMIS Tables prior to using this utility.

Update the fiscal year:

❏ Under **Increment Fiscal Year by 1**:

- Select **Increment** to increment the fiscal year by one. If **Increment** is not selected, the fiscal year is not incremented.
- The **Fund/Year** field is display only and indicates the fund/fiscal year that can be incremented.

Note: The new fund/fiscal year must exist in the current year or Budget of next year.

❏ Click **Retrieve** to reset all rows with Increment selected to the default setting (e.g., clear the check boxes). If you click **Retrieve**, any unprocessed changes are lost.

❏ Click **Execute** to start the update process. You are prompted to create a backup.

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

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~~HIDEPAGE~~

Vacate Employee from Forecast Positions - HRS6200

Position Management > Utilities > Vacate Employee from Forecast Positions

This utility is used to remove an employee from all positions that the employee occupies without performing a change in position (CIP) to remove.

This utility is for forecast records only.

Vacate an employee from forecast positions:

Field	Description
Employee	Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee, and click **Retrieve**. Or, click ⋮ to perform a search in the Employees directory. Type data in one or more of the search fields. Click **Search**. A list of data that matches the search criteria is displayed. Select an employee name from the list. Otherwise, click **Cancel**.
Vacate	Select to vacate the employee from the position currently displayed. **Note**: After selecting positions that should be vacated, click **Save**, and the employee will be removed from the position. If the employee has supplement positions and all regular positions are being vacated, the supplements must be vacated also. If the employee has multiple regular positions, and not all of the regular positions are being vacated, then vacating the supplement positions is not required.

❏ Click 🔎 to display the detail information for the selected row.

- If **Accept Chgs** is selected, you can choose to vacate the employee from the position.
- If **Accept Chgs** is not selected, the employee cannot be vacated from the position, and **Vacate** is not displayed on the page.

Position Type	This field is display only and is populated based on the job code.
Position Number	This field is display only.
Position Description	This field is display only.
Billet Number	This field is display only and indicates the five-digit billet number used to identify the job position within the position number.
Sch YR	This field is display only and indicates the school year.
Job Code	This field is display only and identifies the job (e.g., 0001 = Superintendent, 1003 = 10 month - 3rd Grade Teacher).
Status	This field is display only and indicates the current status of the position.

❏ Click **Save** to save the changes.

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~~HIDEPAGE~~

Vacate Forecast Supplement Positions - HRS6275

Position Management > Utilities > Vacate Forecast Supplement Positions

This utility is used to clear out the forecast supplement records assigned to an employee. It is recommended to vacate all supplemental records except supplements that apply directly to an employee (e.g., career ladder, experience pay, doctorate, degree stipends).

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

This utility is for forecast records only.

If updating tables, create an export using Export PMIS Tables prior to using this utility.

Vacate an employee from forecast positions:

❏ Click **Select** to choose the supplement positions to be vacated. Use the following buttons to select which supplement positions to move to the right side of the page:

 - Click to move selected entries from the left side to the right side of the page.

 - Click to move all entries from the left side to the right side of the page.

 - Click to move selected entries from the right side to the left side of the page.

 - Click to move all entries from the right side to the left side of the page.

❏ Click **Execute** to execute the process. The following reports are available:

- Vacate Forecast Supplement Positions Process Error Listing
- Vacate Forecast Supplement Positions

❏ Click **Select All** button to select all reports. Or, click **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 reports.

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

❏ Click **Process** to process the records. You are prompted to create a backup.

After the export process is completed, the actual update is performed. If the update is successful,

a message indicating that the vacate supplement position update was processed successfully is displayed.

❑ Click **Cancel** to return to the Vacate Forecast Supplement Positions page without vacating any forecast supplement positions.