


# Position Management Process - Sample Timeline

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The timelines and tasks included in this document are only a sample of the Position Management workflow. You can adjust accordingly to meet your LEA's needs.

## Position Management Process - Sample Timeline (February/March)

In the February/March timeframe, prior to using the Position Management application, 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 Process guide.

❑ **Timelines** | Set up 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/eliminations.

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

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

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❑ **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 for each group.

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❑ **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 the 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 (only job codes and salary tables) from the current to the next year.
- Update the forecast conversion first pay date table when moving employees from 13/27 to 12/26 payments.
- Delete old forecast records.
- Create a forecast from the current year.
- Run the first snapshot of all forecast positions through the simulation process on all salaries and groups.
- Continue to use the simulation process for each group. Forecast record modifications can be performed to modify each simulation until you are satisfied with a simulation to update the forecast records and Budget.


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