# Position Management Process - Sample Timeline (All Months)

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# Position Management Process - Sample Timeline

This Position Management Sample Timeline document serves as a suggested timeline for ASCENDER Position Management processes and tasks that occur throughout the year. 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 Payroll/Personnel) 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.

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- 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.

# Position Management Process - Sample Timeline (April-June)

In the April-June timeframe, perform the following Position Management tasks.

For complete information, review the Position Management Process guide.

❏ Edit forecast position records.

❏ Use reports to verify data.

❏ Run salary simulations

❏ Verify forecast records.

# Position Management Process - Sample Timeline (June-July)

In the June-July timeframe, perform the following Position Management task.

For complete information, review the Position Management Process guide.

Use the Position Management > Utilities > Update Fiscal Year by Fund page to update the forecast fiscal year for distributions.

# Position Management Process - Sample Timeline (July)

In the July timeframe, perform the following Position Management tasks.

For complete information, review the Position Management Process guide.

❏ Process service records prior to moving forecast to current. Service records should be completed and posted prior to moving those employees who have a July contract begin date.

❏ Use the Position Management > Utilities > Move Forecast to CYR Position and Payroll to move the July group from forecast to current.

❏ Include any travel/business allowance XTRA duties.

## Position Management Process - Sample Timeline (August)

In the August timeframe, perform the following Position Management tasks.

For complete information, review the Position Management Process guide.

❏ Process service records prior to moving forecast to current. Service records should be completed and posted prior to moving those employees who have an August contract begin date.

❏ Use the Position Management > Utilities > Move Forecast to CYR Position and Payroll to move the August group from forecast to current.

❏ Include any travel/business allowance XTRA duties.

❏ Use the Position Management > Utilities > Move Forecast to NYR Payroll page to move forecast to the next year payroll for August accruals.

## Position Management Process - Sample Timeline (September)

In the September timeframe, perform the following Position Management tasks.

For complete information, review the Position Management Process guide..

❏ Process service records prior to moving forecast to current. Service records should be completed and posted prior to moving those employees who have a September contract begin date.

❏ Use the Position Management > Utilities > Move Forecast to CYR Position and Payroll to move the September group from forecast to current.

❏ Move all XTRA duty codes.

❑ Determine if retroactive pay processing is necessary. If so, use the Position Management > Utilities > Retro Pay Processing to process the retroactive pay process.

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