



ASCENDER - Position Management: Setup and Processing for New Users

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ASCENDER - Position Management: Setup and Processing for New Users

This guide provides new users with the necessary steps to begin using the Position Management application.

This guide assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).

Set up Position Management Current Year Payroll Tables

1. [Review and/or update job codes.](#)

[Personnel](#) > [Tables](#) > [Job/Contract](#) > [Job Codes](#)

Before beginning this process, consider the existing job codes in the current year payroll. It is important that there are no changes made to the existing job codes that are already assigned to employees in the current year; however, you can add new job codes to the table.

| Delete | Job Code | Job Description | EEOC Code | Account Code | Salary Concept | Inc |
|--------------------------|----------|-----------------------------|-------------------------|-----------------------------|-------------------------------|-----|
| <input type="checkbox"/> | 0000 | SUBSTITUTE TEACHER | | | A Use annual salary table | |
| <input type="checkbox"/> | 0020 | HOURLY HOLIDAY PAY | 16 Service workers | 199-51-6129.00-999-8-99-0-1 | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0100 | SUPERINTENDENT | 01 Official, admin, mgr | | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0101 | INTERIM SUPERINTENDENT | 01 Official, admin, mgr | XXX-XX-XXXXXX-XXX-X-XX-X | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0113 | ASSISTANT SUPERINTENDENT | 01 Official, admin, mgr | | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0115 | BUSINESS MANAGER | 01 Official, admin, mgr | | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0116 | CURRICULUM DIRECTOR | 01 Official, admin, mgr | | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0120 | ADMINISTRATIVE ASST. | 01 Official, admin, mgr | XXX-XX-XXXXXX-XXX-X-XX-X | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0121 | DIRECTOR SPECIAL PROGRAMS | 01 Official, admin, mgr | XXX-XX-XXXXXX-XXX-X-XX-X | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0122 | DIRECTOR, FOOD SERVICES | 16 Service workers | | D Use hourly/daily rate table | |
| <input type="checkbox"/> | 0125 | DIRECTOR, SPECIAL EDUCATION | | | A Use annual salary table | |
| <input type="checkbox"/> | 0128 | FACILITATOR/DAEP | | | A Use annual salary table | |
| <input type="checkbox"/> | 0129 | ADMIN COM ED & ATT | | | A Use annual salary table | |
| <input type="checkbox"/> | 0130 | OCS/DAEP TCHR | 07 Other classm teach | XXX-XX-XXXXXX-XXX-X-XX-X | A Use annual salary table | |
| <input type="checkbox"/> | 0133 | SUPERVISOR, VOC EDUCATION | | | A Use annual salary table | |

For LEAs that accrue, each job code can only tie to one accrual code. You may need to perform maintenance to ensure a good starting point. For example, if a job code is set up for a teacher and you have employees with 187 work days and employees with 197 work days tied to that job code, a new job code should be added so that an accrual code exists for both sets of

employees. Do not make changes to existing job codes that are tied to employees, changes can be made when creating positions.

If the LEA expenses workers' compensation, it is important to set up those codes on the job code table. If workers' compensation codes are not established, expensing will not occur for that position. For each position, the workers' compensation code is retrieved from the job code.

2. [Update salary tables.](#)

When using Position Management, all employees must be tied to one of the following salary tables:

[Personnel > Tables > Salaries > Local Annual](#) - Contracted employees

| Delete | Pay Grade | Pay Step | Max Days Employed | Local Sched | Annual Amt |
|--------|-----------|----------|-------------------|-------------|------------|
| | ADM | 29 | 000 | | 73,033.02 |
| | AGR | 0 | 226 | | 48,971.65 |
| | AGR | 01 | 226 | | 50,495.00 |
| | AGR | 02 | 226 | | 50,865.82 |
| | AGR | 09 | 207 | | 48,971.65 |
| | AGR | 29 | 226 | | 71,437.78 |
| | AGR | 30 | 226 | | 70,762.18 |
| | NTE | 0 | 187 | | 46,000.00 |
| | NTE | 1 | 000 | | 46,200.00 |
| | NTE | 10 | 187 | | 48,950.00 |
| | NTE | 11 | 187 | | 49,250.00 |
| | NTE | 12 | 187 | | 49,550.00 |
| | NTE | 13 | 187 | | 49,950.00 |
| | NTE | 14 | 187 | | 50,450.00 |
| | NTE | 15 | 187 | | 51,250.00 |

[Personnel > Tables > Salaries > Hourly/Daily](#) - Contracted and Non-contracted employees

Tables > Salaries Personnel

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records
 Pay Grade: All
 Pay Step: All
 Retrieve Print

| Delete | Pay Grade | Pay Step | Hrs Per Day | Rate Type | Local Sched | Pay Type | Est Ovtm Hrs | Amount |
|--------|-----------|----------|-------------|-----------|-------------|----------|--------------|---------|
| | 1 | 00 | 8.00 | Hourly | | | 0.0 | 9.040 |
| | 11 | 01 | 0.00 | Daily | | | 0.0 | 245.427 |
| | 12 | 00 | 0.00 | Daily | | | 0.0 | 281.810 |
| | 12 | 01 | 0.00 | Daily | | | 0.0 | 299.647 |
| | 12 | 02 | 0.00 | Daily | | | 0.0 | 251.549 |
| | 12 | 03 | 0.00 | Daily | | | 0.0 | 286.956 |
| | 12 | 04 | 0.00 | Daily | | | 0.0 | 286.957 |
| | 12 | 05 | 0.00 | Daily | | | 0.0 | 236.724 |
| | 12 | 06 | 0.00 | Daily | | | 0.0 | 251.450 |
| | 13 | 01 | 0.00 | Daily | | | 0.0 | 312.376 |
| | 13 | 02 | 0.00 | Daily | | | 0.0 | 361.991 |
| | 13 | 03 | 0.00 | Daily | | | 0.0 | 305.234 |
| | 13 | 04 | 0.00 | Daily | | | 0.0 | 321.220 |
| | 13 | 05 | 0.00 | Daily | | | 0.0 | 349.341 |
| | 14 | 00 | 0.00 | Daily | | | 0.0 | 294.492 |

First 1 / 10 Last Add

Personnel > Tables > Salaries > Midpoint - Contracted and Non-contracted employees

If your LEA has employees who are not tied to a salary table, it may be helpful to create a midpoint table. For instance, if all LEA employees are assigned to a pay scale except for cafeteria workers and bus drivers, whose salaries vary, it can be difficult to maintain a consistent table setup. In this case, you can set up a midpoint table with different pay grades for each job and then assign employees to that table.



TIP: Consider grouping “like” jobs when setting up the midpoint table.

Tables > Salaries Personnel

Save

LOCAL ANNUAL HOURLY/DAILY EXTRA DUTY FUND TO GRANT STATE MINIMUM SUBSTITUTE MIDPOINT

Records
 Pay Grade: All
 Pay Type: All
 Retrieve Print

| Delete | Pay Grade | Pay Type | Minimum | Maximum | Midpoint | Hours | Dock Rate Type |
|--------|-----------|-----------------------|---------|---------|----------|-------|----------------|
| | DPG | 3 Hourly employee | 7.250 | 7.250 | 7.250 | 0.00 | H - Hourly |
| | 112 | 1 Contracted employee | 169.490 | 230.000 | 199.745 | 0.00 | D - Daily |
| | 126 | 1 Contracted employee | 169.490 | 230.000 | 199.745 | 0.00 | D - Daily |
| | 1PG | 3 Hourly employee | 9.500 | 14.500 | 12.000 | 8.00 | H - Hourly |
| | 210 | 1 Contracted employee | 226.620 | 316.180 | 271.400 | 0.00 | D - Daily |
| | 212 | 1 Contracted employee | 226.620 | 316.180 | 271.400 | 0.00 | D - Daily |
| | 2PG | 3 Hourly employee | 10.510 | 14.670 | 12.590 | 8.00 | H - Hourly |
| | 311 | 1 Contracted employee | 247.020 | 344.640 | 295.830 | 0.00 | D - Daily |
| | 3PG | 3 Hourly employee | 11.510 | 16.070 | 13.790 | 8.00 | H - Hourly |
| | 412 | 1 Contracted employee | 269.250 | 375.650 | 322.450 | 0.00 | D - Daily |
| | 4PG | 3 Hourly employee | 12.730 | 17.750 | 15.240 | 8.00 | H - Hourly |
| | 511 | 1 Contracted employee | 288.090 | 401.950 | 345.020 | 0.00 | D - Daily |
| | 512 | 1 Contracted employee | 288.090 | 401.950 | 345.020 | 0.00 | D - Daily |
| | 522 | 1 Contracted employee | 288.090 | 401.950 | 345.020 | 0.00 | D - Daily |
| | 526 | 1 Contracted employee | 288.090 | 401.950 | 345.020 | 0.00 | D - Daily |

First 1 / 2 Last Update Midpoint Add

□ Click **+Add** and enter the following information:

- **Pay Grade**
- **Pay Type**
- **Minimum** - The lowest daily pay rate an employee would receive in this pay grade/pay type.
- **Maximum** - The highest daily pay rate an employee would receive in this pay grade/pay type.

□ Click **Save**. The **Midpoint** is automatically calculated.

3. [Update school calendar.](#)

[Personnel > Tables > Workday Calendars > School Calendar](#)

All positions must be tied to a school calendar code. Existing school calendar codes can be used. If there are positions that do not follow the existing calendar codes, you can add new calendar codes. Calendar codes can be alpha or numeric.

It is important that the begin and end dates match the calendar. For example, when entering the begin and end dates, many LEAs use 7/1-6/30 for 12-month employees. If 7/1 and/or 6/30 fall on a weekend and your calendar has a begin date of 7/2, then the employee's begin date should be 7/2.

The screenshot shows the 'Tables > Workday Calendars' interface. At the top, there is a 'Save' button. Below it are three tabs: 'SCHOOL CALENDAR', 'COPY SCHOOL CALENDAR', and 'DELETE SCHOOL CALENDAR'. The main area contains a table with columns for Day, Day of Week, Position, Position Name, and Position Number. A 'Print' button is located to the right of the table. An 'Add' button is at the bottom right of the table area.

| Day | Day of Week | Position | Position Name | Position Number |
|-----|-------------|----------|-------------------|-----------------|
| | E | MT | 200 M & O | 200 |
| 5 | MT | | 260 M & O | 261 |
| E | NC | | 197 LIBRARY AIDES | 197 |
| 5 | NC | | 197 LIBRARY AIDES | 197 |
| E | PC | | 220 Admin | |
| 5 | PC | | 220 Admin | 220 |
| E | PR | | 207 Staff | 207 |
| 5 | PR | | 207 Staff | 207 |
| E | TC | | 187 Staff | 187 |
| 5 | TC | | 187 Staff | 187 |
| E | TR | | TRS WORKDAYS | 187 |
| 6 | TR | | TRS Cal | 261 |
| 5 | TR | | TRS WORKDAYS | 187 |
| 4 | TR | | TRS | 259 |

4. Set up next school year pay dates.

[Payroll > Tables > Pay Dates](#)

Pay dates can be created for the next school year. The current year dates are used at this time, but the pay dates for the next year must be set up prior to rolling positions to the next year Position Management.

Tables > Pay Dates

Save

Start Pay Date: 09-16-2022 Retrieve Print

| Delete | Details | School Year | Pay Date | Begin Date | End Date | TRS Month | TWC Quarter | Print Alternate Address |
|--------|---------|-------------|------------|------------|------------|-----------|-------------|--------------------------|
| | | 2024 | 08-23-2024 | 08-01-2024 | 08-31-2024 | 08 | 3 | <input type="checkbox"/> |
| | | 2024 | 07-25-2024 | 07-01-2024 | 07-31-2024 | 07 | 3 | <input type="checkbox"/> |
| | | 2024 | 06-24-2024 | 06-01-2024 | 06-30-2024 | 06 | 2 | <input type="checkbox"/> |
| | | 2024 | 05-24-2024 | 05-01-2024 | 05-31-2024 | 05 | 2 | <input type="checkbox"/> |
| | | 2024 | 04-25-2024 | 04-01-2024 | 04-30-2024 | 04 | 2 | <input type="checkbox"/> |
| | | 2024 | 03-25-2024 | 03-01-2024 | 03-31-2024 | 03 | 1 | <input type="checkbox"/> |
| | | 2024 | 02-23-2024 | 02-01-2024 | 02-29-2024 | 02 | 1 | <input type="checkbox"/> |
| | | 2024 | 01-25-2024 | 01-01-2024 | 01-31-2024 | 01 | 1 | <input type="checkbox"/> |
| | | 2023 | 12-20-2023 | 12-01-2023 | 12-31-2023 | 12 | 4 | <input type="checkbox"/> |
| | | 2023 | 11-24-2023 | 11-01-2023 | 11-30-2023 | 11 | 4 | <input type="checkbox"/> |
| | | 2023 | 10-25-2023 | 10-01-2023 | 10-31-2023 | 10 | 4 | <input type="checkbox"/> |
| | | 2023 | 09-25-2023 | 09-01-2023 | 09-30-2023 | 09 | 3 | <input type="checkbox"/> |
| | | 2023 | 08-25-2023 | 07-08-2023 | 08-04-2023 | 08 | 3 | <input type="checkbox"/> |
| | | 2023 | 07-25-2023 | 06-10-2023 | 07-07-2023 | 07 | 3 | <input type="checkbox"/> |
| | | 2023 | 06-23-2023 | 05-06-2023 | 06-09-2023 | 06 | 2 | <input type="checkbox"/> |

First 1 / 2 Last Add

Selected Pay Date:

| Adjustment Nbr | Date Pay Run | Interface | User ID |
|----------------|--------------|-----------|---------|
| No Rows | | | |

5. Clear next year payroll tables and copy all tables from current to next year.

Log on to the current year pay frequency.



CAUTION: Before moving forward, keep in mind that this step clears all manual changes that were made to next year salary tables.

Perform the following two processes:

[Payroll > Next Year > Copy CYR Tables to NYR > Clear Next Year Tables](#)

This tab is used to clear:

- All next year tables for all pay frequencies regardless of the pay frequency to which you are logged on.
- Only EOY accrual data.
- Only next year payroll budget data.

Individual frequencies cannot be selected for deletion.

Note: EOY accrual reversals must be created and interfaced to Finance before clearing next year tables or EOY accrual data only.



Clear next year tables:

| Field | Description |
|-------------------------------------|---|
| Clear EOY Accrual Data Only | Select to clear the EOY accrual data records only. All other next year data is left intact. |
| Clear NY Payroll Budget Only | Select to clear the next year payroll budget records only. All other next year data is left intact. |

Note: If an option is not selected, all displayed next year tables for all pay frequencies (regardless of the pay frequency to which you are logged on) are cleared when you click **Execute**.

All available next year payroll tables are displayed on the left side of the page. Select the tables to clear. Use the arrow buttons to move the selected tables from the left side to the right side of the page.

Click **Execute**. A message is displayed indicating that the next year records have been cleared. Click **OK**.

Payroll > Next Year > Copy CYR Tables to NYR > Copy Current Year Tables

This tab is used to copy all tables or selected tables as next year records for the corresponding next year frequency (e.g., CYR = 6, NYR = F; CYR = 5, NYR = E; and CYR = 4, NYR = D). The tables are copied from all current year frequencies to all next year frequencies (except the School Calendar table). The School Calendar table header is only copied for the frequency to which you are logged on. To copy the school calendar for another frequency, log on to the other frequency and copy the School Calendar table. The calendar itself is not copied, only the calendar code and calendar description. Type the year in the **Start Year** field and the beginning month in the **Start Month** field to begin the process of building the next year calendar.


The screenshot shows the 'Copy Current Year Tables' interface. The left side lists various tables with checkboxes and three-dot menu icons. The right side has 'Execute' and 'Select All Tables' buttons. A large black arrow points down to the 'Execute' button.

| Table Name | Selected | More Options |
|-----------------------------|-------------------------------------|--------------|
| Accrual Calendar | <input checked="" type="checkbox"/> | ⋮ |
| Extra Duty Pay | <input checked="" type="checkbox"/> | ⋮ |
| Hourly / Daily Salary | <input checked="" type="checkbox"/> | ⋮ |
| Job Code | <input checked="" type="checkbox"/> | ⋮ |
| Local Annual Salary | <input checked="" type="checkbox"/> | ⋮ |
| Midpoint Salary | <input checked="" type="checkbox"/> | ⋮ |
| School Calendar | <input checked="" type="checkbox"/> | ⋮ |
| State Minimum Salary | <input checked="" type="checkbox"/> | ⋮ |
| Substitute Salary | <input checked="" type="checkbox"/> | ⋮ |
| Workers' Compensation Rates | <input checked="" type="checkbox"/> | ⋮ |

Copy current year tables:

All available current year tables are displayed on the left side of the page. Select the tables to copy. Select the corresponding check boxes to select a table. At least one table option must be selected.

- Select next to the table(s) to copy.
- Select again to clear the selected check box.

Click  if you do not want to copy the entire table, but want to include specific data from a table.

Notes:

- Only the selected tables are processed.
- If the tables are copied multiple times and the record in the current year does not exist in the next year, the new record is inserted in the next year.
- If the tables are copied multiple times and a description is changed in the next year but not in the current year, the description is replaced by the description in the current year table.

Click **Select All Tables** to select all current year tables to copy to the next year.

Click **Execute**. A separate preview report is displayed for each selected table.

Click **Process** on each report page to copy the table. Or, click **Cancel** not to copy the table. A message is displayed indicating that the tables were successfully copied. Click **OK**.

6. Copy current year staff to next year payroll.

Log on to the current year pay frequency.

Payroll > Next Year > Copy CYR Staff to NYR

The screenshot shows the 'Next Year > Copy CYR Staff to NYR' payroll setup screen. The interface includes a header with a home icon, the title 'Next Year > Copy CYR Staff to NYR', and a 'Payroll' menu. Below the header are three buttons: 'Execute', 'Reset', and 'Delete'. The main area is divided into 'Parameters' and 'Options' sections. The 'Parameters' section includes 'Pay Status' (Active, Inactive, Both), 'Primary Campus' (All), 'Payoff Date', 'Pay Campus' (All), 'Frequency' (6 MONTHLY CYR), 'Contract Begin Date', 'Salary Concept' (All), 'Contract End Date', 'Extract ID', 'Contract Months', and 'Employee Nbr'. The 'Options' section includes 'Include Employees with Termination Date' (checked), 'Inactivate Records when Creating NY Tables', 'Next Year's Funding Code' (4), and 'Number of Remaining Deductions'. A 'Preview changes' checkbox is also present.

Complete the following:

In the **Pay Type** field, select *E - Exclude Substitute*.

Under **Options**:

- Select **Include Employees with Termination Date**.
- In the **Next Year's Funding Code**, type the fiscal year that exists in Budget.

Click **Execute**. If the process is successful, a preview report is displayed. Review the employee list to verify that the correct data was copied to the next year records. Also, review the total employee count at the end of the report.

Click **Process** to accept the changes and continue. A message is displayed indicating that the process was completed successfully. In addition, a list of the database record tables that were copied is displayed. Click **OK**.

Click **Cancel** to return to the Copy CYR Staff to NYR page without making the changes.

Set up District Administration Options

1. Update PMIS district options.

[District Administration > Options > Position Management](#)

This page is used to create and maintain Position Management options including the types of calculations that should be used in Position Management and the specified default values to be used for certain types of Position Management transactions. These options are not typically changed throughout the school year.

The screenshot displays the 'District Administration' page for 'Options > Position Management'. The interface includes a 'Save' button at the top left and 'Retrieve' and 'Print' buttons below it. The main section is titled 'District Options' and contains the following settings:

- Use PMIS:
- Unemployment Eligible:
- FICA / Medicare Eligible:
- Use Forecast Conversion Tables:
- Employee Must Be Assigned a Position Prior to Creating Payroll Record:
- Allow CYR Position Description Changes (Admin only):
- Allow Forecast Position Description Changes:
- Display Options to Ignore Pct of Day and Pct of Year for Position Records:

On the right side, there are three input fields for years, all containing the value '20':

- Current Year:
- Next Year:
- Minimum Foundation Year:

Below these is a dropdown menu for 'Default Position Record Status' set to 'V - Vacant(just position info, ready to fill emp)'.

At the bottom, the 'Payment Options' section includes:

- Round Salary to Nearest Whole Dollar:
- During CIC Calculation, Pay One-Time Supplement:

☐ Verify that the following fields are completed and accurate:

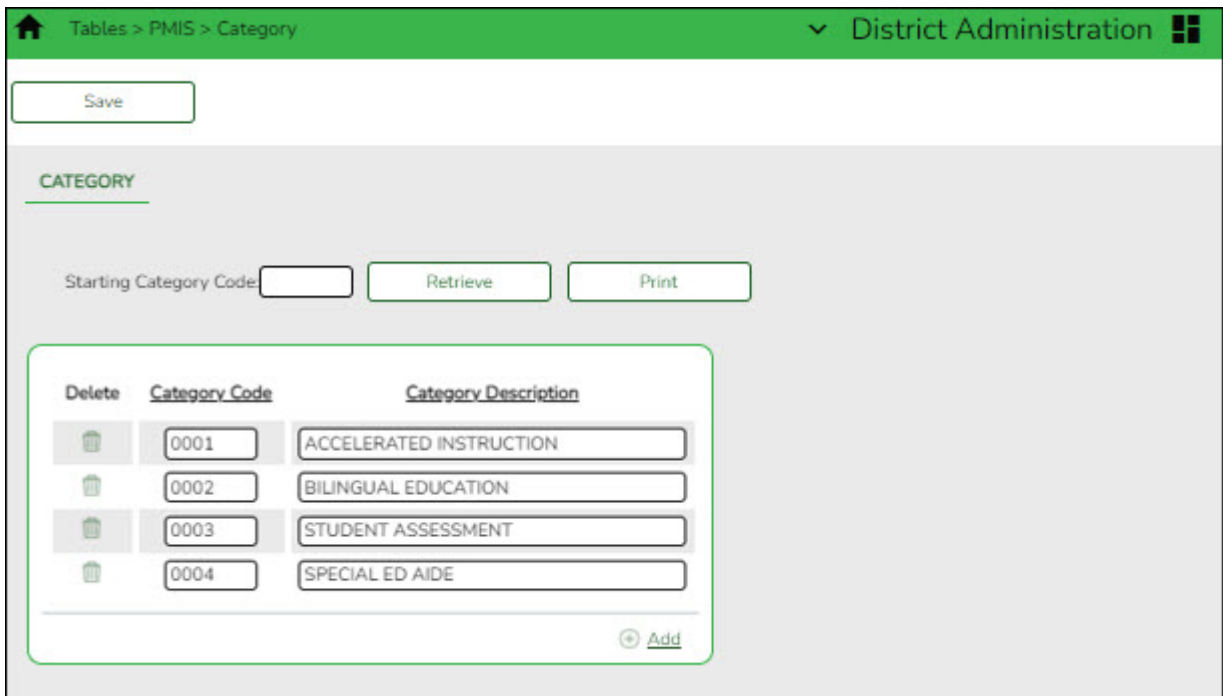
- **Current Year**
- **Next Year**
- **Minimum Foundation Year** - Type the four-digit current or next school year in the YYYY format to allow the system to select the corresponding tables to calculate the state minimum salary amount. If this year matches the current year value, the current Personnel state minimum table is used. If this year matches the next year value, the next year Personnel state minimum table is used.

2. [Set up category codes.](#)

[District Administration > Tables > PMIS > Category](#)

This step is optional.

This page is used to create and maintain a list of LEA-defined category codes to be used for Position Management. The category codes can be assigned to positions to allow for easier inquiries. There are no calculations done based on the category. The codes are strictly for Position Management and do not impact any other system. Categories can be used in User Created Reports; however, they are not available in any other report parameters.



3. [Update first pay date codes.](#)

Use the following pages to establish the current and next year first pay dates and codes.

[District Administration > Tables > PMIS > First Pay Date > Current Year](#)

This tab is used to create and maintain a list of codes associated with current year pay dates to be used for Position Management. The codes are used:

- To establish an association between a table ID and a starting pay date.
- To establish a start date for a new teacher so that a new teacher can be paid over 13 months.
- To determine the first pay date of the new school year when calculating the amounts already paid to an employee.
- To calculate the amount to be paid to an employee during the change-in-compensation processing.
- To update the payroll data with the data in the forecast records, and to move the forecast data into the current position records.

In this example, the first pay date codes begin with J, A, or S to represent the first pay date month (July, August, or September). The subsequent two characters represent the calendar code. Codes can be a maximum of three characters and any letters should be uppercase.

The screenshot shows the 'First Pay Date' tab in the PMIS system. The interface includes a 'Save' button, a 'CURRENT YEAR' tab (selected), and a 'NEXT YEAR' tab. Below the tabs is a 'Starting Pay Date Code' input field, a 'Retrieve' button, and a 'Print' button. The main area displays a table with the following columns: Delete, First Pay Date Code, First Pay Date, and Description.

| Delete | First Pay Date Code | First Pay Date | Description |
|--------|---------------------|----------------|-------------------------|
| | A11 | 08-25-20 | |
| | A17 | 08-25-20 | TEACHERS AUG START |
| | AAP | 08-25-20 | 207 DAYS |
| | AF1 | 08-25-20 | 197 DAYS CN DIRECTOR |
| | AFD | 08-25-20 | 220 |
| | AFP | 08-25-20 | |
| | AIC | 08-25-20 | |
| | ANU | 08-25-20 | |
| | AO1 | 08-25-20 | 197 DAYS |
| | AO2 | 08-25-20 | 203 DAYS |
| | AO4 | 08-25-20 | 195 DAYS |
| | APD | 08-25-20 | |
| | APF | 08-25-20 | 197 DAYS |
| | ARG | 08-25-20 | 210 DAYS |
| | J12 | 07-25-20 | CUST/MAINT 251+ HOLIDAY |
| | J16 | 07-25-20 | TEACHERS JULY START |
| | JAG | 07-25-20 | |
| | JCO | 07-25-20 | 226 DAYS |

Complete the Current Year and Next Year tabs. The Current Year tab represents the first pay dates for the current school year, and the Next Year tab represents the first pay dates for the next school year.

[District Administration > Tables > PMIS > First Pay Date > Next Year](#)

Tables > PMIS > First Pay Date District Administration

Save

CURRENT YEAR NEXT YEAR

Starting Pay Date Code: Retrieve Print

| Delete | First Pay Date Code | First Pay Date | Description |
|--------|---------------------|----------------|---------------------------|
| | A17 | 08-25-20 | 210 DAYS 1ST OF AUG START |
| | AAP | 08-25-20 | |
| | AEC | 08-25-20 | EARLY CHECK-13 |
| | AF1 | 08-25-20 | 197 CN DIRECTOR |
| | AIC | 08-25-20 | |
| | AO1 | 08-25-20 | |
| | AO2 | 08-25-20 | |
| | AO3 | 08-25-20 | |
| | AO4 | 08-25-20 | 195 DAYS |
| | APF | 08-25-20 | |
| | ARG | 08-25-20 | |
| | J12 | 07-25-20 | |
| | J16 | 07-25-20 | TEACHERS JULY START |
| | JCO | 07-25-20 | |
| | JEP | 07-25-20 | |
| | JFD | 07-25-20 | 220 DAYS |
| | JFT | 07-25-20 | |
| | JMD | 07-25-20 | |

4. Set up action reason codes.

[District Administration > Tables > PMIS > Action Reason](#)

This page is used to create and maintain a list of action reason codes to be used for Position Management.

An action code is required when a change is made to a position record that creates a historical record. Action Codes for termination transactions can be cross-referenced with the Termination Reason Codes on the [Personnel > Tables > Job / Contract > Termination Reason](#) tab. Be sure to consider LEA-required data and statistics when creating action reason codes.

Tables > PMIS > Action Reason District Administration

Save

ACTION REASON

Starting Action Reason:

| Delete | Action Reason | Action Reason Description | Termination Reason | Termination Description |
|--------|---------------------------------|--|---------------------------------|--|
| | <input type="text" value="01"/> | <input type="text" value="EMPLOYEE VACATED (SYS)"/> | <input type="text"/> | |
| | <input type="text" value="02"/> | <input type="text" value="CHANGE IN POSITION INFO (SYS)"/> | <input type="text"/> | |
| | <input type="text" value="03"/> | <input type="text" value="EMPLOYEE MOVED INTO POS (SYS)"/> | <input type="text"/> | |
| | <input type="text" value="04"/> | <input type="text" value="AS OF END-OF-YEAR (SYS)"/> | <input type="text"/> | |
| | <input type="text" value="05"/> | <input type="text" value="AS OF FIRST-OF-YEAR (SYS)"/> | <input type="text"/> | |
| | <input type="text" value="06"/> | <input type="text" value="Resigned"/> | <input type="text"/> | |
| | <input type="text" value="07"/> | <input type="text" value="Promotion"/> | <input type="text"/> | |
| | <input type="text" value="08"/> | <input type="text" value="Remove Supplement"/> | <input type="text"/> | |
| | <input type="text" value="09"/> | <input type="text" value="New Hire"/> | <input type="text" value="04"/> | <input type="text" value="Left the employment market for personal reasons"/> |
| | <input type="text" value="10"/> | <input type="text" value="Added Supplement"/> | <input type="text"/> | |
| | <input type="text" value="11"/> | <input type="text" value="Lateral"/> | <input type="text"/> | |
| | <input type="text" value="12"/> | <input type="text" value="Demotion"/> | <input type="text"/> | |

5. Set up inactive reason codes.

[District Administration > Tables > PMIS > Inactivate Reason](#)

This page is used to create and maintain a list of inactive reason codes to be used for Position Management. When a position is changed to inactive status, you are prompted to enter a reason, which is saved in the historical records.

Tables > PMIS > Inactivate Reason District Administration

Save

INACTIVATE REASON

Starting Inactivate Reason: Retrieve Print

| Delete | Inactivate Reason | Inactivate Reason Description |
|--------|-------------------|-------------------------------|
| | AT | Attrition |
| | NA | extra billet |
| | SN | Student Numbers |

Add

6. Transfer positions from one first pay date code to another.

[District Administration > Tables > PMIS > First Pay Date Forecast Conversion](#)

This page is used to change a start date code to another for forecast conversion, and should only be used if you need to transfer all positions from one **First Pay Date Code** to a different **First Pay Date Code**. All positions tied to the **From Start Code** will be added to the **To Start Code**. For example, the program could be used to update the first pay date code when a new hire employee on a 13-month pay date cycle needs to convert to a regular 12-month pay date cycle.

Tables > PMIS > First Pay Date Forecast Conversion District Administration

Save

FIRST PAY DATE FORECAST CONVERSION

Starting Pay Date Code: Retrieve Print

| Delete | From Start Code | From Start Code Description | To Start Code | To Start Code Description |
|--------|-----------------|-----------------------------|---------------|---------------------------|
| | ATC | 187 Days (25 pmts) | STC | 187 Days (24 pmts) |
| | JCO | July Payroll | SNC | 197 Days |

Add

7. Update forecast conversion data.



Prior to completing this step, the calendars and pay dates must exist in the next year payroll files.

District Administration > Tables > PMIS > Forecast Conversion

This page is used to create forecast data for the next year's records. This table maintains the data conversion information by the **First Pay Date Code** for the **Calendar Code**, **Begin Date**, **End Date**, **Payoff Date**, **Max Days**, **Number Of Days Off** and **Actual Payments**. These fields should be updated with the dates to be used for the next school year. From this data, the appropriate calendar data is located and the following calculation is performed: The **Local Begin Date** is subtracted from the **Local End Date**, and then the **Number of Days Off** is subtracted resulting in the number of **Actual Days**. This data is moved to the next year's records at the time the budget is created for the next year.

Tables > PMIS > Forecast Conversion District Administration

Save

FORECAST CONVERSION

Retrieve Print Refresh Dates

| Delete | First Pay Date Code | Calendar Code | Extra Duty Code | First Pay Date Description | Local Begin Date | Local End Date | Last Pay Date | Max Days | Number Of Days Off | Actual Days | Actual Payments |
|--------------------------|---------------------|---------------|-----------------|----------------------------|------------------|----------------|---------------|----------|--------------------|-------------|-----------------|
| <input type="checkbox"/> | SF2 | F2 | | | 08-11-2022 | 05-19-2023 | 08-25-2023 | 180 | 0.0 | 180 | 12 |
| <input type="checkbox"/> | SBD | BD | | | 08-15-2022 | 05-19-2023 | 08-25-2023 | 173 | 0.0 | 173 | 12 |
| <input type="checkbox"/> | S11 | 11 | | TEACHER + 10 DAYS | 08-01-2022 | 05-25-2023 | 08-25-2023 | 190 | 0.0 | 190 | 12 |
| <input type="checkbox"/> | S10 | 10 | | | 08-10-2022 | 05-19-2023 | 08-25-2023 | 180 | 0.0 | 180 | 12 |
| <input type="checkbox"/> | JFD | FD | | 220 DAYS | 07-18-2022 | 06-30-2023 | 06-23-2023 | 220 | 0.0 | 220 | 12 |
| <input type="checkbox"/> | JEP | EP | | | 07-25-2022 | 06-30-2023 | 06-23-2023 | 215 | 0.0 | 215 | 12 |
| <input type="checkbox"/> | JCO | CO | | | 07-01-2022 | 06-30-2023 | 06-23-2023 | 226 | 0.0 | 226 | 12 |
| <input type="checkbox"/> | J16 | 16 | | TEACHERS JULY START | 07-01-2022 | 06-30-2023 | 06-23-2023 | 226 | 0.0 | 226 | 12 |
| <input type="checkbox"/> | J12 | 12 | | | 07-01-2022 | 06-30-2023 | 06-23-2023 | 251 | 0.0 | 251 | 12 |
| <input type="checkbox"/> | ARG | RG | | | 07-20-2022 | 06-13-2023 | 07-25-2023 | 210 | 0.0 | 210 | 12 |
| <input type="checkbox"/> | AO4 | O4 | | 195 DAYS | 08-01-2022 | 06-02-2023 | 07-25-2023 | 195 | 0.0 | 195 | 12 |
| <input type="checkbox"/> | AO3 | O3 | | | 07-25-2022 | 06-07-2023 | 07-25-2023 | 203 | 0.0 | 203 | 12 |
| <input type="checkbox"/> | AO2 | O2 | | | 07-25-2022 | 06-07-2023 | 07-25-2023 | 203 | 0.0 | 203 | 12 |
| <input type="checkbox"/> | AO1 | O1 | | | 08-01-2022 | 06-06-2023 | 07-25-2023 | 197 | 0.0 | 197 | 12 |
| <input type="checkbox"/> | AF1 | F1 | | 197 CN DIRECTOR | 08-01-2022 | 06-06-2023 | 07-25-2023 | 197 | 0.0 | 197 | 12 |
| <input type="checkbox"/> | AAP | AP | | | 07-25-2022 | 06-13-2023 | 07-25-2023 | 207 | 0.0 | 207 | 12 |
| <input type="checkbox"/> | | | T2 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | T1 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | S6 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | S4 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | MA | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | M9 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | M8 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | M7 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | M6 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |
| <input type="checkbox"/> | | | M5 | | -- | -- | -- | 0 | 0.0 | 0 | 12 |

For each pay date code, complete the fields on the page. The next year begin and end dates must match the new calendars in the next year payroll files, and the payoff dates must exist in the pay dates table for each first pay date code.

This process updates the table and replaces the mass updating process that is done in the next year payroll.

The **Days Off** field is used to reduce the days worked without tying back to unavailable days on a calendar. For example, a district police officer may work every day (or have the potential to work every day) but may have a certain number of days off per year that can be taken at any time.

Import Position and Distribution Data

1. [Import checklists.](#)

After the setup steps are completed, use the following checklists to import position and distribution data.

[Import Position Data to PMIS Checklist](#) (prints separately)

[Import Distribution Data to PMIS Checklist](#) (prints separately)

2. [Verify imported data.](#)

Use the following reports to verify that the records were correctly imported to the current year Position Management.

Generate the [Position Management > Reports > PMIS Reports > HRS8050 - Position Listing by Campus](#) report to verify that all positions exist with accurate information.

The report provides a list of all positions within a campus. The report is sorted by campus number and includes each job position along with a position number, billet number, description, employee number, employee name, percentage of day worked, and pay frequency.

| Position Nbr | Billet Nbr | Position Description | Freq | Emp Nbr | Employee Name | Pct Worked |
|--------------|------------|----------------------|------|---------|---------------|------------|
| P5H1414 | 00001 | CRIMINAL JUSTICE | 5 | 000388 | | 100.00 % |
| S5HSH | 00001 | Softball Head | 5 | 000388 | | 0.00 % |
| P5H1406 | 00003 | SECONDARY SPECIAL | 5 | 001011 | | 100.00 % |
| S5H17 | 00004 | Special Ed | 5 | 001011 | | 0.00 % |
| S5HCS | 00001 | Cheer Sponsor | 5 | 001011 | | 0.00 % |
| P5H1408 | 00001 | SECONDARY ART | 5 | 001115 | | 100.00 % |
| P5H1401 | 00002 | SECONDARY ENGLISH | 5 | 001125 | | 100.00 % |
| S5HYZ | 00001 | Color Guard | 5 | 000710 | | 0.00 % |
| S5HBB | 00001 | Baseball Head | 5 | 000634 | | 0.00 % |
| S5HOC | 00001 | Football Offen Coord | 5 | 000634 | | 0.00 % |
| P5H1407 | 00001 | SECONDARY FOREIGN | 5 | 000036 | | 100.00 % |
| S5HCS | 00002 | Cheer Sponsor | 5 | 000051 | | 0.00 % |
| PSA1159 | 00001 | DHS Receptionist | 5 | 000060 | | 100.00 % |

☐ Generate the [Position Management > Reports > PMIS Reports > HRS8054 - PMIS/Payroll Discrepancy Report](#) to verify that there are no discrepancies.

The report allows you to print a list of all positions that do not have payroll records or a list of payroll records that do not have position management records.

| Pos Freq | Pos Typ | Position Nbr | Billet Nbr | Description | Emp Nbr | Employee Name | Message |
|----------|---------|--------------|------------|-----------------------|---------|---------------|---|
| 5 | p | P5M1454 | 00003 | TEACHERS AIDE | 000183 | | Does not have the same job codes or extra duty codes in CYR Payroll |
| 5 | s | S5M91 | 00003 | Associates Degree | 000183 | | Does not have the same job codes or extra duty codes in CYR Payroll |
| 5 | p | P5M1405 | 00003 | SECONDARY READING | 000991 | | Does not have the same job codes or extra duty codes in CYR Payroll |
| 5 | p | P5E1354 | 00004 | TEACHERS AIDE | 000604 | | Does not have the same job codes or extra duty codes in CYR Payroll |
| 5 | p | P5H1414 | 00001 | CRIMINAL JUSTICE | 000388 | | Does not have the same job codes or extra duty codes in CYR Payroll |
| 5 | s | S5HSH | 00001 | Softball Head | 000388 | | Does not have the same job codes or extra duty codes in CYR Payroll |
| 5 | p | P5M1451 | 00001 | SECRETARY PEIMS CLERK | 000210 | | Does not have the same job codes or extra duty |

☐ Generate the [Position Management > Reports > PMIS Reports > HRS8053 - Midpoint Salaries Exception Report](#) if your LEA uses midpoint.

This report provides a list of positions that have salary rates that are not within the minimum and maximum salary ranges.

| Position - Billet Nbr | Employee Name | Emp Nbr | Freq | Hourly/Daily Rate | Min/Max Salary | Exception Message |
|-----------------------|---------------|---------|------|-------------------|----------------|-----------------------------|
| PSA1103 - 00001 | | 000898 | 5 | 242.750 | 230.000 | Daily Rate > Maximum Salary |
| PSA1105 - 00001 | | 000889 | 5 | 406.060 | 401.950 | Daily Rate > Maximum Salary |
| P5E1307 - 00004 | | 000261 | 5 | 354.100 | 354.096 | Daily Rate > Maximum Salary |
| P5E1354 - 00007 | | 000224 | 5 | 116.400 | 116.000 | Daily Rate > Maximum Salary |
| P5H1407 - 00001 | | 000036 | 5 | 354.100 | 354.096 | Daily Rate > Maximum Salary |

End of Report

☐ For additional information, use the [Position Management > Inquiry > PMIS Position Inquiry](#) page to perform a position inquiry.

Inquiry > PMIS Position Inquiry Position Management

Retrieve Print

Position Description: Position Nbr:

| Details | Position Description | Position Number | Billet Number | Position Type | Status | Freq | Employee Nbr | Employee Name | Campus |
|-----------------------|----------------------|-----------------|---------------|---------------|--------|------|--------------|---------------|--------|
| <input type="radio"/> | CHILDCARE PROVIDER | P5D1802 | 00003 | Position | Active | E | 000434 | | 773 |
| <input type="radio"/> | CHILDCARE PROVIDER | P5D1802 | 00001 | Position | Active | E | 000719 | | 773 |
| <input type="radio"/> | CHILDCARE PROVIDER | P5D1802 | 00002 | Position | Active | E | 000890 | | 773 |

First 1 / 1 Last

Occupant

Employee Nbr: 000434 Employee Name: [REDACTED]

Primary Job: Y Increase Eligible: N

Pay Grade: 2PG Hourly Emp State Step: Begin Date: 07-28-20 End Date: 06-28-20 Payoff Date: 07-30-20

Days Off: 0 Nbr Days Employed: 217 Hourly/Daily Rate: 10.510 Salary: 18,245.36 Remaining Payments: 24

Position

Status: A Frequency: E School Year: 20

Category: Supplement Attached: N

Job Code: 1802 1st Pay Date Code: APR Calendar Code: DC Primary Campus: 773 Dept:

Hours Per Day: 8.0 Percent Day Employed: 100 Percent Year Employed: 100 State Minimum Days: 0

Pay Concept: Midpoint: EEOC: 16 Workers' Comp: B TRS Member Pos: 03 Max Days: 217 Max Payments: 24 Overtime Eligible: Y

Supervisor: Position: Billet: Employee Number/Name: not occupied

Ignore Pct Day Employed for Salary Calcs: N Ignore Pct Year Employed for Salary Calcs: N

Perform Position Management Maintenance

Log on to the next year.

1. [Delete next year PMIS.](#)

[Position Management > Utilities > Mass Delete Forecast Positions](#)

☐ Leave all fields blank and click **Execute**. A list of processing reports is displayed.

☐ Select the reports to generate, and print or save the reports.

☐ Click **Process** to delete the forecast records. You are prompted to create a [backup](#).

2. [Copy current year positions to the next year.](#)

[Position Management > Utilities > Create Forecast Positions](#)

Utilities > Create Forecast Positions Position Management

←

Include Proposed Positions:

Move 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:



If an LEA has the **Percent of Year** field set to less than 100% of the stipend amount on the [Position Management > Maintenance > PMIS Supplement Modify > Position Record](#) tab, they should consider whether or not to select the **Reset Supplement Amounts based on Extra Duty Code Table Default Amount** field.

If the **Reset Supplement Amounts based on Extra Duty Code Table Default Amount** field is selected, the amount on the supplement position record is reset to match the amount on the extra duty table.

- Select all fields and click **Execute**. A list of processing reports is displayed.

Utilities > Create Forecast Positions Position Management

←

Processing Reports

| Select | Report Name |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | Create Forecast Positions Process Error Listing |
| <input checked="" type="checkbox"/> | Create Forecast Positions by Position/Billet |

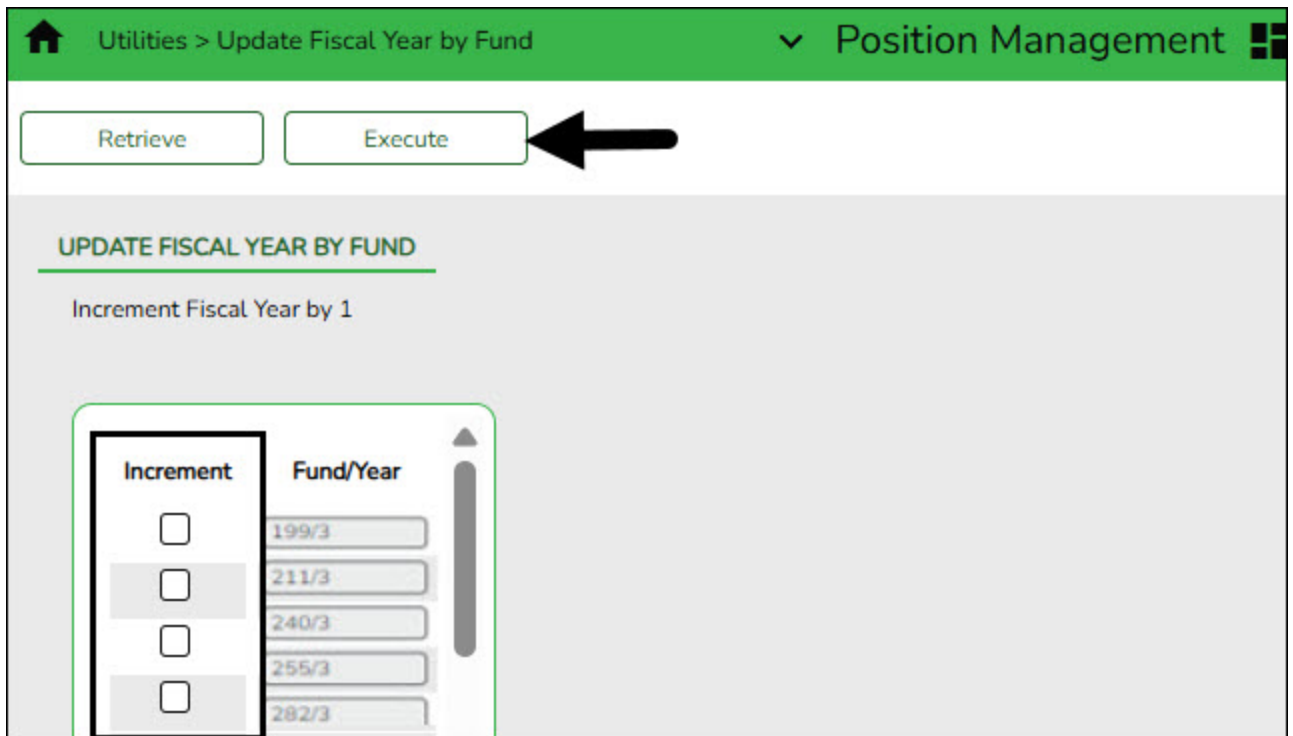
- Select the reports to generate and print or save the reports. Verify any errors and make corrections as needed.
- Click **Process**. You are prompted to create a [backup](#).

3. [Update the fiscal year for distributions.](#)

Prior to completing this step, verify that the new year budget is initialized in ASCENDER.

[Position Management > Utilities > Update Fiscal Year by Fund](#)

Select the fund/years to be incremented. This process increments the position distribution fiscal year by 1.



Click **Execute**.

4. [Generate the Position Listing by Campus Report.](#)

[Position Management > Reports > PMIS Reports > HRS8050 - Position Listing by Campus](#)

Generate the Position Listing by Campus Report from next year Position Management to determine the following:

- If any employees need to be moved to a different position.
- If you have vacant positions you need to update with employee information.
- If you have any supplemental positions that need to be updated for stipends.

| Date Run: Cnty Dist: Campus: | | Position Listing by Campus ISD | | | Program: HRS8050 Page: 1 of 11 | |
|------------------------------------|------------|-----------------------------------|------|---------|-----------------------------------|------------|
| Position | Billit Nbr | Position Description | Freq | Emp Nbr | Employee Name | Pct Worked |
| EXTRADUTY | 00002 | FROZEN CARRYOVER | 6 | 000026 | [REDACTED] | 0.00 % |
| PTEACHER | 00205 | ENGLISH | 6 | 000026 | [REDACTED] | 100.00 % |
| ATHLETICS | 00015 | BASKETBALL ASST | 6 | 000027 | [REDACTED] | 0.00 % |
| ATHLETICS | 00098 | TRACK ASST | 6 | 000027 | [REDACTED] | 0.00 % |
| ATHLETICS | 00113 | VOLLEYBALL ASST | 6 | 000027 | [REDACTED] | 0.00 % |
| EXTRADUTY | 00005 | FROZEN CARRYOVER | 6 | 000034 | [REDACTED] | 0.00 % |
| EXTRADUTY | 00006 | FROZEN CARRYOVER | 6 | 000041 | [REDACTED] | 0.00 % |
| PTEACHER | 00606 | SOCIAL STUDIES | 6 | 000041 | [REDACTED] | 100.00 % |
| PCAMPUS | 00114 | AIDE | 6 | 000048 | [REDACTED] | 100.00 % |

- 5. (If necessary) Transfer positions from one first pay date code to another.

District Administration > Tables > PMIS > First Pay Date Forecast Conversion

This page is used to change a start date code to another for forecast conversion, and should only be used if you need to transfer all positions from one **First Pay Date Code** to a different **First Pay Date Code**. All positions tied to the **From Start Code** will be added to the **To Start Code**. For example, the program could be used to update the first pay date code when a new hire employee on a 13-month pay date cycle needs to convert to a regular 12-month pay date cycle.

Tables > PMIS > First Pay Date Forecast Conversion District Adm

Save

FIRST PAY DATE FORECAST CONVERSION

Starting Pay Date Code:

| Delete | From Start Code | From Start Code Description | To Start Code | To Start Code Description |
|--------|----------------------------------|-----------------------------|----------------------------------|---------------------------|
| | <input type="text" value="ATC"/> | 187 Days (25 pmts) | <input type="text" value="STC"/> | 187 Days (24 pmts) |
| | <input type="text" value="JCO"/> | July Payroll | <input type="text" value="SNC"/> | 197 Days |

- 6. (If necessary) Update regular and supplemental positions.

Note: If your LEA comes across a situation where teachers are not being captured in the ASCENDER Student system for grade reporting or scheduling, contact your regional ESC consultant for guidance.

Position Management > Maintenance > PMIS Position Modify or PMIS Supplement Modify

Maintenance -> PMIS Position Modify Position Management

Save

Position Number: PTEACHER ; Position Description: TEACHER ; Retrieve

| Details | Billet | Sch YR | Description | Status | Freq | Emp Nbr | First Name | Middle Name | Last Name | Gen |
|----------------------------------|--------|--------|-------------------|--------|------|---------|------------|-------------|--------------|-----|
| <input type="radio"/> | 00000 | 2024 | TEACHER | V | F | | | | | |
| <input type="radio"/> | 00100 | 2024 | ARTS | V | F | | | | | |
| <input type="radio"/> | 00102 | 2024 | ARTS & FLORAL | A | F | 001179 | WANDA | MARIE | WILLIAMS | |
| <input checked="" type="radio"/> | 00103 | 2024 | ARTS | A | F | 001185 | WENDY | CHARLES | WILSON | |
| <input type="radio"/> | 00104 | 2024 | ARTS | A | F | 000791 | MELISSA | A | NEW EMPLOYEE | |
| <input type="radio"/> | 00105 | 2024 | SCIENCE HALF TIME | A | F | 001190 | WHITNEY | D | WOOD | |

First | 1 | 6 | Last

POSITION RECORD | DISTRIBUTION | DATE | BUDGET

Occupant

Employee Nbr: 001185 ; Employee Name: WENDY CHARLES WILSON

Primary Job: Increase Eligible; New Employee:

Pay Grade: TMA ; Pay Step: 06 ; Schedule: ; State Step: 06 ; Begin Date: 08-03-2023 ; End Date: 05-23-2024 ; Payoff Date: 08-23-2024 ;

Days Off: 0.0 ; Nbr Days Employed: 183.00 ; Hourly/Daily Rate: 259.158 ; Salary: 47,426.00 ; Remaining Payments: 12 ; Exclude Days for TEA:

Position

Accept Changes: ; Status: A - Active ; Frequency: F - Monthly NYR ; School Year: 2024 ; Calculate Salary

Category: ; Supplement Attached:

Job Code: 1000 - TEACHER ; 1st Pay Date Code: S10 ; Calendar Code: 10 ; Primary Campus: 001 - 001 School ; Dept:

Hours Per Day: 0.000 ; Percent Day Employed: 100 ; Percent Year Employed: 100 ; State Minimum Days: 187 - Valid basic days in contract

Pay Concept: Annual EEOC ; Workers' Comp: A TRS Member Pos: 02 - Teacher, Librarian ; Max Days: 183.0 ; Max Payments: 12 ; Overtime Eligible:

Supervisor Position: ; Billet: ; Employee Number/Name:

Ignore Pct of Day for Salary Calcs: ; Ignore Pct of Yr for Salary Calcs:



If working on the Distribution tab, you must select an account code from the autosuggest drop down in the **Account Code** field versus typing in the full account code in order to validate against the grant code table.

If necessary, use one of the following options to vacate an employee from a position:

Option 1: It is best practice to use the [Position Management > Utilities > Vacate Employee from Forecast Positions](#) page to vacate a position.

Typically, when an employee decides to leave the LEA at the end of the year, the employee is paid off in payroll at the end of their contract; therefore, no additional action is necessary for the current year. However, in the forecast records, the employee must be removed from all existing positions.

Utilities > Vacate Employee from Forecast Positions Position Management

Save

VACATE EMPLOYEE FROM FORECAST POSITIONS

Employee: 000075 Retrieve

| Vacate | Details | Accept Chgs | Position Type | Position Number | Position Description | Billet | Sch YR | Job Code | Status |
|-------------------------------------|---------|-------------------------------------|---------------|-----------------|------------------------------|--------|--------|----------------------------------|--------|
| <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | P | P6B4A217 | LEAD WELLNESS/PE FACILITATOR | 00001 | 2025 | A217 - LEAD WELLNESS FACILITATOR | A |
| <input checked="" type="checkbox"/> | | <input checked="" type="checkbox"/> | S | S64TV | TRAVEL | 00009 | 2025 | | A |

Occupant Information

Job Code: A217 - LEAD WELLNESS FACILITATOR Primary Job: Percent Day Employed: 100 Percent Year Employed: 100

Pay Concept: Midpoint Pay Grade: AP3 Contracted emp State Step: 20 Begin Date: 07-15-2024 End Date: 06-13-2025 Payoff Date: 08-15-2025

Max Days: 210.0 Days Off: 0.0 Nbr Days Employed: 210.00 Hours Per Day: 0.000 Hourly/Daily Rate: 384.688 Actual Salary: 80,784.00 Remaining Payments: 12

Primary Campus: 903 - 903 School Dept: 0 Calendar Code: 38 TRS Member Pos: 01 - Professional staff Incr Eligible:

Distribution Information

| Activity Code | Account Code | Grant Code | Workers' Comp | Expense 373 | Employer Contribution | Percent | Amount | Dup Acct |
|------------------|---------------------------|------------|---------------|-------------------------------------|-------------------------------------|---------|-----------|----------|
| 80 - Base Salary | 199-13-6119.00-903-511000 | | A | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 70.000 | 56,548.80 | |
| 80 - Base Salary | 101-35-6119.00-938-599000 | | A | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 30.000 | 24,235.20 | |
| Totals: | | | | | | 100.000 | 80,784.00 | |

- Retrieve the employee's position record.
- Select the **Vacate** check box for each position.
- Click **Save**.

Option 2: Use the [Position Management > Maintenance > PMIS Forecast Change](#) page (only available in the next year payroll) to change an employee from one position to another. A list of the employee's existing positions is displayed with a section to either enter a new position or vacate a position.

Maintenance > PMIS Forecast Change Position Management

FORECAST POSITION CHANGE

Employee: Retrieve

Current Forecast Positions

| Details | Position Number | Position Description | Billet | Sch YR | Job Code | Status |
|---------|-----------------|----------------------|--------|--------|----------------|--------|
| | PTEACHER | SOCIAL STUDIES | 00607 | 2024 | 1000 - TEACHER | A |

Occupant Information

Recalculate Position: Vacate: Ignore Pct of Day for Salary Calcs: Ignore Pct of Yr for Salary Calcs:

Job Code: 1000 - TEACHER Primary Job: Percent Day Employed: 100 Percent Year Employed: 100 Calculate

Pay Concept: Annual Pay Grade: TBA Pay Step: 13 Schedule: State Step: 13 Begin Date: 08-03-2023 End Date: 05-23-2024 Payoff Date: 08-23-2024

Max Days: 183.0 Days Off: 0.0 Nbr Days Employed: 183.00 Hours Per Day: 0.000 Hourly/Daily Rate: 294.011 Actual Salary: 53,804.00 Remaining Payments: 8

Primary Campus: 001 - 001 School Dept: Calendar Code: 10 TRS Member Pos: 02 - Teacher, librarian Incr Pay Step: Exclude Days for TEA:

Distribution Information

| Delete | Activity Code | Account Code | Grant Code | Workers' Comp | Expense 373 | Employer Contribution | Percent | Amount | Dup Acct |
|---------|------------------|---------------------------|------------|---------------|-------------------------------------|-------------------------------------|---------|-----------|----------|
| | 80 - Base Salary | 199-11-6119.00-001-411000 | | A | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 100.000 | 53,804.00 | |
| Totals: | | | | | | | 100.000 | 53,804.00 | |

7. Generate the PMIS/Payroll Discrepancy Report.

[Position Management > Reports > PMIS Reports > HRS8054 - PMIS/Payroll Discrepancy Report](#)

Generate the PMIS/Payroll Discrepancy report to determine if there are any active employees not assigned to a forecast position. Below are some examples of the PMIS/Payroll Discrepancy report:

| Date Run: Cnty Dist: | | PMIS / Payroll Discrepancy Report ISD Job Level Comparison | | | | | Program: HRS8054 Page: 1 of 9 | |
|-------------------------|---------|--|------------|----------------------|---------|---------------|---|--|
| Freq | Pos Typ | Position Nbr | Billet Nbr | Description | Emp Nbr | Employee Name | Message | |
| E | P | P5A1102 | 00001 | ADMINISTRATIVE | 000180 | | Does not have the same job codes or extra duty codes in CYR Payroll | |
| E | P | P5A1103 | 00001 | DIR OF TECHNOLOGY | 000898 | | Does not have the same job codes or extra duty codes in CYR Payroll | |
| E | P | P5A1104 | 00001 | TRANSPORTATION COORD | 000148 | | Does not have the same job codes or extra duty codes in CYR Payroll | |
| E | P | P5A1105 | 00001 | BUSINESS MANAGER | 000889 | | Does not have the same job codes or extra duty codes in CYR Payroll | |
| E | P | P5A1106 | 00001 | DIRECTOR ATHLETICS | 000906 | | Does not have the same job codes or extra duty codes in CYR Payroll | |
| E | P | P5A1107 | 00001 | PEIMS COORDINATOR | 000128 | | Does not have the same job codes or extra duty codes in CYR Payroll | |
| E | P | P5A1110 | 00001 | FACILITIES DIRECTOR | 000872 | | Does not have the same job codes or extra duty | |

| Date Run: Cnty Dist: | | PMIS / Payroll Discrepancy Report ISD Employee Level Comparison | | | | | Program: HRS8054 Page: 1 of 1 | |
|-----------------------------|---------|---|------------|-------------|---------|------------------------|--|--|
| Freq | Pos Typ | Position Nbr | Billet Nbr | Description | Emp Nbr | Employee Name | Message | |
| F | p | PCAMPUS | 00300 | PRINCIPAL | 000012 | ADKINS, ALEXANDER LYNN | Inactive in CYR Payroll | |
| 6 | | | | | 001140 | BUSMGR, IMA | Active emp not assigned to Forecast Position | |
| 6 | | | | | 000831 | POER, PACER P | Active emp not assigned to Forecast Position | |
| 6 | | | | | 001096 | WHARTON, TYLAR DENAA | Active emp not assigned to Forecast Position | |
| 6 | | | | | 001120 | WILLIAMS, WENDI IRENE | Active emp not assigned to Forecast Position | |
| 6 | | | | | 001134 | WYNN, WYOMING | Active emp not assigned to Forecast Position | |
| 6 | | | | | 001135 | YARBROUGH, ZACHARY KAY | Active emp not assigned to Forecast Position | |
| 6 | | | | | 001136 | YOUNG, ZEB MARTIN | Active emp not assigned to Forecast Position | |
| 6 | | | | | 001138 | ZAPATA, ZONA ASHLYN | Active emp not assigned to Forecast Position | |
| Total Number of Employees 9 | | | | | | | | |
| End of Report | | | | | | | | |

8. Generate a user-created report.

[Position Management > Reports > User Created Reports > CYR/NYR Positions](#)

Generate a PMIS user-created report to verify that the **Increase Eligible** field is selected for applicable positions. It is possible that the field is not selected for new LEA employees from last year.

- It is recommended** to verify the **Nbr Remain Payments** field prior to calculating salaries.
- Select the following fields on the user-created report:

The screenshot shows the 'Position Management' interface with the following sections:

- PMIS Position/Distribution Export File Auto Select Options:**
 - PMIS Position Control
 - PMIS Position Distribution
- PMIS Position Control:**
 - CYR/NYR Flag
 - Position Nbr
 - Billet Nbr
 - Position Type
 - Position Description
 - Position Status
 - Position School Year
 - Frequency
 - Occ Employee Nbr
 - Primary Job
 - Increase Elig
 - Occ Pay Grade
 - Occ Pay Step
 - Occ Pay Schedule
 - State Step
 - Contract Beg Date
 - Contract End Date
 - Payoff Date
 - Nbr Days Off
 - Act Hrlly Dly Rate
 - Salary Amount
 - Nbr Remain Payments
 - Job Category
 - Supplement Attached
 - Job Code
 - 1st Pay Date Code
 - Calendar Code
 - Campus ID
 - Dept
 - Hrs Per Day
 - Day Empld Pct
 - Pct of Year
 - Pay Concept
 - EEOC Code
 - Workers' Comp
 - TRS Position Code
 - Max Days
 - Max Payments
 - Ovtm Elig Flg
 - State Minimum Days
 - Spvsr Position Nbr
 - Spvsr Billet Nbr
 - Supplement Extra Days
 - Suppl to Pos Nbr
 - Suppl to Pos Billet
 - Extra Duty Code
 - Supplement Type
 - Supplement Max Amt
 - Base Suppl On Dly Rate
 - Supplement Pay 1 Time
 - Date Supplement 1 Time
 - Accept Change
 - Date Create/Update
 - Date Fill
 - Fill Position Reason
 - Date Criteria
 - Date Authorization
 - Date Authorization End
 - Date Entry
 - Date Inactive
 - Inactive Reason Code
 - Vacate Reason
 - Pay Grade
 - Pay Step
 - Pay Schedule
 - FTE - Equiv Units
 - Midpoint Base
 - Percent of Midpoint
 - Unemployment Elig Flag
 - FICA Elig
 - TRS Status Code
 - Budget Amount
 - Budget Salary Override
 - Actual/Budget Ind
 - Pay Type
 - Occ Pay Type
 - Suppl Recalculate
 - Ign Pct Day For Sal Calcs
 - Ign Pct Yr For Sal Calcs
 - New Employee
- PMIS Position Distribution:**
 - CYR/NYR Flag
 - Position Nbr
 - Billet Nbr
 - Position Type
 - Distribution Sequence
 - Frequency
 - Job Code
 - Account Type
 - Pay Activity
 - Workers' Comp
 - File ID
 - Fund
 - Function
 - Object
 - Sub Object
 - Organization
 - Fiscal Year
 - Program Intent
 - Ed Span
 - Project Detail
 - Account Amount
 - Account Percent
 - TRS Grant Code
 - Extra Duty Code
 - Expense 373
 - Contrib Acct Flag
- Employee Demo:**
 - First Name
 - Middle Name
 - Last Name
 - Generation

Click **Create Report**. The report is displayed. Use the sort/filter functionality to group the applicable data.

Note: The number of remaining payments reflected on the report is displayed on the Job Info tab as the number of annual payments and the number of remaining payments for the employee for any P position type. If the LEA uses S acct types or business allowances for extra duties, S position types on this report should reflect the correct number of remaining payments. Prior to continuing, make the necessary position corrections.

9. [Update position records.](#)

[Position Management > Maintenance > PMIS Position Modify > Position Record](#)

If necessary, update the **Increase Eligible** field to identify the employees who are eligible to receive a salary increase for the new school year when running simulations. Only the employees with this field selected will receive a salary increase.

Maintenance > PMS Position Modify Position Management

Save

Position Number: PTEACHER : Position Description: TEACHER : Retrieve

| Details | Billet | Sch YR | Description | Status | Freq | Emp Nbr | First Name | Middle Name | Last Name | Gen |
|----------------------------------|--------|--------|-------------------|--------|------|---------|------------|-------------|-----------|-----|
| <input type="radio"/> | 00000 | 2024 | TEACHER | V | F | | | | | |
| <input type="radio"/> | 00100 | 2024 | ARTS | V | F | | | | | |
| <input type="radio"/> | 00102 | 2024 | ARTS & FLORAL | A | F | 001179 | | | | |
| <input checked="" type="radio"/> | 00103 | 2024 | ARTS | A | F | 001185 | | | | |
| <input type="radio"/> | 00104 | 2024 | ARTS | A | F | 000791 | | | | |
| <input type="radio"/> | 00105 | 2024 | SCIENCE HALF TIME | A | F | 001190 | | | | |

First < 1 / 6 > Last

POSITION RECORD DISTRIBUTION DATE BUDGET

Occupant

Employee Nbr: 001185 : Employee Name: _____

Primary Job: Increase Eligible: Employee:

Pay Grade: TMA : Pay Step: 06 : Schedule: _____ : State Step: 06 : Begin Date: 08-03-2023 : End Date: 05-23-2024 : Payoff Date: 08-23-2024

Days Off: 0.0 : Nbr Days Employed: 183.00 : Hourly/Daily Rate: 259.158 : Salary: 47,426.00 : Remaining Payments: 12 : Exclude Days for TEA:

Position

Accept Changes: Status: A - Active : Frequency: F - Monthly NYR : School Year: 2024 : Calculate Salary

Category: _____ : Supplement Attached:

Job Code: 1000 - TEACHER : 1st Pay Date Code: 510 : Calendar Code: 10 : Primary Campus: 001 - 001 School : Dept: _____

Hours Per Day: 0.000 : Percent Day Employed: 100 : Percent Year Employed: 100 : State Minimum Days: 187 - Valid basic days in contract

Pay Concept: Annual EEOC : Workers' Comp: A TRS Member Pos: 02 - Teacher, Librarian : Max Days: 183.0 : Max Payments: 12 : Overtime Eligible:

Supervisor Position: _____ : Billet: _____ : Employee Number/Name: _____

Ignore Pct of Day for Salary Calcs: Ignore Pct of Yr for Salary Calcs:

Clear the **Increase Eligible** field for new employees who are not entitled to a salary increase. Remember that the next year Position Management pay step reflects the same current year Position Management pay step, and the step is increased in the salary simulations if the **Increase Eligible** field is selected.

Maintenance > PMIS Position Modify Position Management

Save

Position Number: PTEACHER : Position Description: TEACHER : Retrieve

| Details | Billet | Sch YR | Description | Status | Freq | Emp Nbr | First Name | Middle Name | Last Name | Gen |
|--------------------------|--------|--------|-------------------|--------|------|---------|------------|-------------|-----------|-----|
| <input type="checkbox"/> | 00000 | 2024 | TEACHER | V | F | | | | | |
| <input type="checkbox"/> | 00100 | 2024 | ARTS | V | F | | | | | |
| <input type="checkbox"/> | 00102 | 2024 | ARTS & FLORAL | A | F | 001179 | | | | |
| <input type="checkbox"/> | 00103 | 2024 | ARTS | A | F | 001185 | | | | |
| <input type="checkbox"/> | 00104 | 2024 | ARTS | A | F | 000791 | | | | |
| <input type="checkbox"/> | 00105 | 2024 | SCIENCE HALF TIME | A | F | 001100 | | | | |

First < 1 / 6 > Last

POSITION RECORD DISTRIBUTION DATE BUDGET

Occupant

Primary Job: Increase Eligible: New Employee:

Pay Grade: TEA : Pay Step: 06 : Schedule: : State Step: 06 : Begin Date: 08-03-2023 : End Date: 05-23-2024 : Payoff Date: 08-23-2024 :
 Days Off: 0.0 : Nbr Days Employed: 183.00 : Hourly/Daily Rate: 259.158 : Salary: 47,426.00 : Remaining Payments: 12 : Exclude Days for TEA:

Position

Accept Changes: Status: A - Active : Frequency: F - Monthly NYR : School Year: 2024 : Calculate Salary

Category: : Supplement Attached:

Job Code: 1000 - TEACHER : 1st Pay Date Code: 510 : Calendar Code: 10 : Primary Campus: 001 - 001 School : Dept:

Hours Per Day: 0.000 : Percent Day Employed: 100 : Percent Year Employed: 100 : State Minimum Days: 187 - Valid basic days in contract

Pay Concept: Annual EEOC : Workers' Comp: A : TRS Member Pos: 02 - Teacher, Librarian : Max Days: 183.0 : Max Payments: 12 : Overtime Eligible:

Supervisor Position: : Billet: : Employee Number/Name: :
 Ignore Pct of Day for Salary Calcs: Ignore Pct of Yr for Salary Calcs:

If necessary, update the **New Employee** field to identify new employees on forecast position records. If selected, the salary simulations will budget the employer contribution for new employees even though they do not have current year payroll records.

Notes:

This field is not displayed on supplemental position records.

If the position is changed to any status other than **Active**, the field is disabled.

Clear this field if an employee is no longer new to the LEA.

[Position Management > Maintenance > PMIS Position Modify > Budget](#)

If there are retirees who work in the LEA, confirm that the **TRS Status** field is set to 5 - *Retired*. If the TRS status is incorrect, there is a possibility that the status will be incorrect (TRS-eligible) when the employee is moved to the current year payroll.

POSITION RECORD DISTRIBUTION DATE BUDGET



Vacancy/Budget Information

Pay Grade: ; Pay Step/State Step: Non-Contracted emp FTE:

Midpoint Base: Plus Percent of Midpoint:

Unemployment Eligible: FICA/Medicare Eligible: TRS Status:



Back Cover