



# **pmis\_initial\_setup\_new\_users**



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# QuickGuide: PMIS - Setup and Processing for New Users

This guide provides new users with the necessary steps to begin using the Position Management Information System (PMIS).

## Set up Human Resources 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
	0000	SUBSTITUTE TEACHER		- - - . - - - -	A Use annual salary table	
	0020	HOURLY HOLIDAY PAY	16 Service workers	199-51-6129.00-999-8-99-0-0	D Use hourly/daily rate table	
	0100	SUPERINTENDENT	01 Official, admin, mgr	- - . - - - - -	D Use hourly/daily rate table	
	0101	INTERIM SUPERINTENDENT	01 Official, admin, mgr	XXX-XX-XXXXXX-XXX-X-XX-X	D Use hourly/daily rate table	
	0113	ASSISTANT SUPERINTENDENT	01 Official, admin, mgr	- - - . - - - - -	D Use hourly/daily rate table	
	0115	BUSINESS MANAGER	01 Official, admin, mgr	- - . - - - - -	D Use hourly/daily rate table	
	0116	CURRICULUM DIRECTOR	01 Official, admin, mgr	- - . - - - - -	D Use hourly/daily rate table	
	0120	ADMINISTRATIVE ASST.	01 Official, admin, mgr	XXX-XX-XXXXXX-XXX-X-XX-X	D Use hourly/daily rate table	
	0121	DIRECTOR SPECIAL PROGRAMS	01 Official, admin, mgr	XXX-XX-XXXXXX-XXX-X-XX-X	D Use hourly/daily rate table	
	0122	DIRECTOR, FOOD SERVICES	16 Service workers	- - . - - - - -	D Use hourly/daily rate table	
	0125	DIRECTOR, SPECIAL EDUCATION		- - . - - - - -	A Use annual salary table	
	0128	FACILITATOR/DAEP		- - . - - - - -	A Use annual salary table	
	0129	ADMIN COM ED & ATT		- - . - - - - -	A Use annual salary table	
	0130	OCS/DAEP TCHR	07 Other classrm teach	XXX-XX-XXXXXX-XXX-X-XX-X	A Use annual salary table	
	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

The screenshot shows a web interface for managing salary tables. At the top, there is a breadcrumb trail 'Tables > Salaries' and a 'Save' button. Below this, there are tabs for different salary types: LOCAL ANNUAL (selected), HOURLY/DAILY, EXTRA DUTY, FUND TO GRANT, STATE MINIMUM, SUBSTITUTE, and MIDPOINT. A 'Records' section contains dropdown menus for 'Pay Grade' (set to 'All') and 'Pay Step' (set to 'All'), along with 'Retrieve' and 'Print' buttons. The main area is a table with the following data:

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

At the bottom of the table, there are navigation controls: 'First', a dropdown menu showing '1' of '5', and 'Last'. An 'Add' button is also present.

[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.

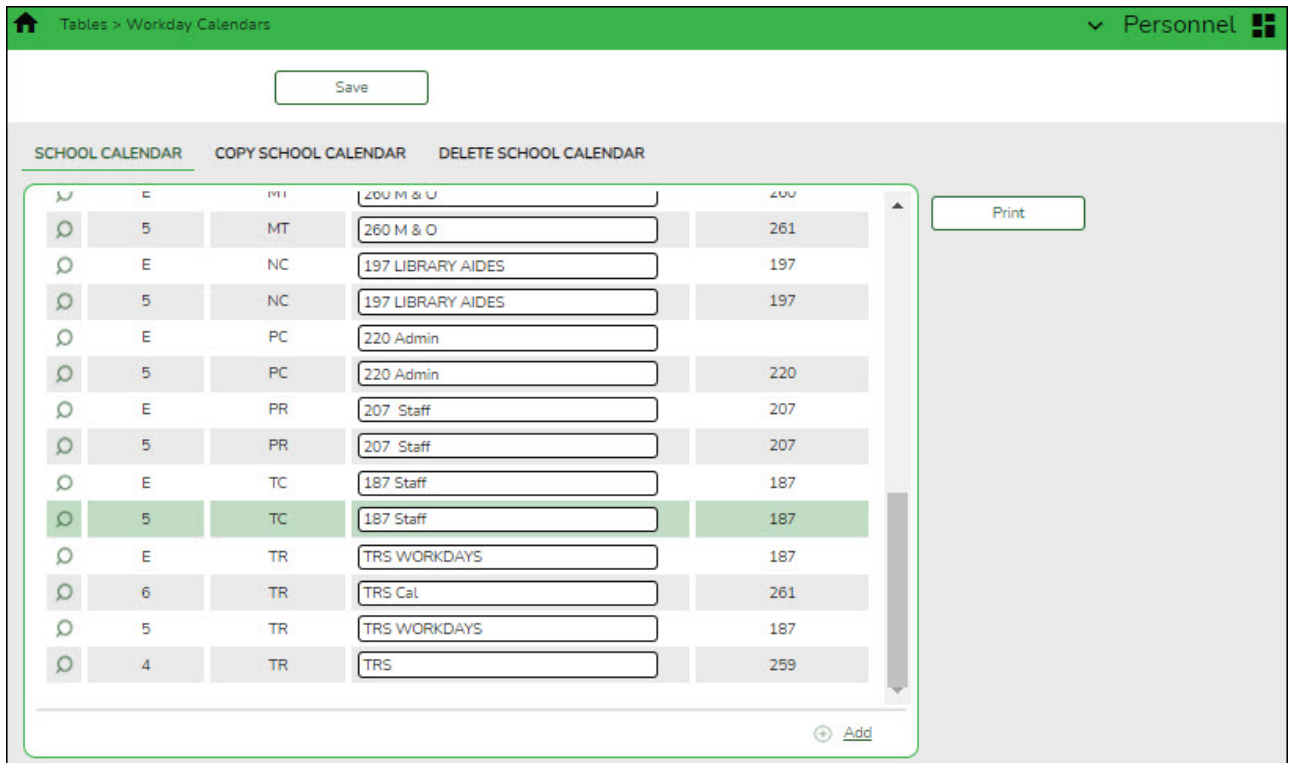
Click **Save**. The **Midpoint** is automatically calculated.

### 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.



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
<b>Clear EOY Accrual Data Only</b>	Select to clear the EOY accrual data records only. All other next year data is left intact.
<b>Clear NY Payroll Budget Only</b>	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 payroll tables, each with a checked checkbox and a three-dot menu icon. The tables listed are: Accrual Calendar, Extra Duty Pay, Hourly / Daily Salary, Job Code, Local Annual Salary, Midpoint Salary, School Calendar, State Minimum Salary, Substitute Salary, and Workers' Compensation Rates. On the right side, there are two buttons: 'Execute' and 'Select All Tables'. A large black arrow points down to the 'Execute' button.

### 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 displays the 'Next Year > Copy CYR Staff to NYR' interface. At the top, there are buttons for 'Execute', 'Reset', and 'Delete'. Below these are the 'Parameters' and 'Options' sections.

**Parameters:**

- Pay Status:** Radio buttons for Active (selected), Inactive, and Both.
- Pay Type:** Dropdown menu set to 'E Exclude Substitute' (highlighted with a black box).
- Job Code:** Dropdown menu set to 'All'.
- Accrual Code:** Dropdown menu set to 'All'.
- Pay Grade:** Input field.
- Prior Yr Emp Date:** Input field set to '00-00-0000'.
- Primary Campus:** Dropdown menu set to 'All'.
- Pay Campus:** Dropdown menu set to 'All'.
- Contract Begin Date:** Input field.
- Contract End Date:** Input field.
- Contract Months:** Input field.
- Payoff Date:** Input field.
- Frequency:** Dropdown menu set to '6 MONTHLY CYR'.
- Salary Concept:** Dropdown menu set to 'All'.
- Extract ID:** Input field.
- Employee Nbr:** Input field.

**Options:**

- Include Employees with Termination Date
- Inactivate Records when Creating NY Tables
- Next Year's Funding Code:
- Number of Remaining Deductions:
- Preview changes

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' interface for 'Options > Position Management'. At the top, there are 'Save', 'Retrieve', and 'Print' buttons. The main section, 'District Options', contains several 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:

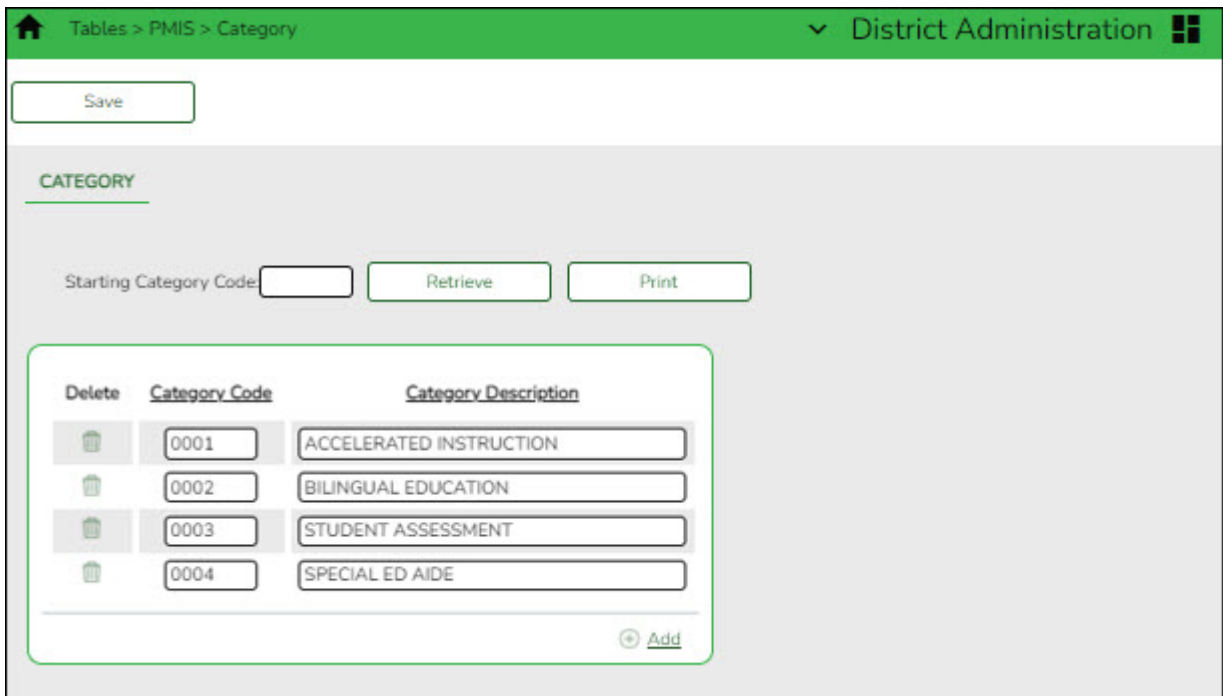
- **Current Year**
- **Next Year**
- **Minimum Foundation Year** - Type the four-digit current or next school year in the YYYY format to allow the system to select the corresponding tables to calculate the state minimum salary amount. If this year matches the current year value, the current Personnel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

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"/> ::	

Add

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
	<input type="text" value="AT"/>	<input type="text" value="Attrition"/>
	<input type="text" value="NA"/>	<input type="text" value="extra billet"/>
	<input type="text" value="SN"/>	<input type="text" value="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
	<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

➕ 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
	SF2	F2			08-11-2022	05-19-2023	08-25-2023	180	0.0	180	12
	SBD	BD			08-15-2022	05-19-2023	08-25-2023	173	0.0	173	12
	S11	11		TEACHER + 10 DAYS	08-01-2022	05-25-2023	08-25-2023	190	0.0	190	12
	S10	10			08-10-2022	05-19-2023	08-25-2023	180	0.0	180	12
	JFD	FD		220 DAYS	07-18-2022	06-30-2023	06-23-2023	220	0.0	220	12
	JEP	EP			07-25-2022	06-30-2023	06-23-2023	215	0.0	215	12
	JCO	CO			07-01-2022	06-30-2023	06-23-2023	226	0.0	226	12
	J16	16		TEACHERS JULY START	07-01-2022	06-30-2023	06-23-2023	226	0.0	226	12
	J12	12			07-01-2022	06-30-2023	06-23-2023	251	0.0	251	12
	ARG	RG			07-20-2022	06-13-2023	07-25-2023	210	0.0	210	12
	AO4	O4		195 DAYS	08-01-2022	06-02-2023	07-25-2023	195	0.0	195	12
	AO3	O3			07-25-2022	06-07-2023	07-25-2023	203	0.0	203	12
	AO2	O2			07-25-2022	06-07-2023	07-25-2023	203	0.0	203	12
	AO1	O1			08-01-2022	06-06-2023	07-25-2023	197	0.0	197	12
	AF1	F1		197 CN DIRECTOR	08-01-2022	06-06-2023	07-25-2023	197	0.0	197	12
	AAP	AP			07-25-2022	06-13-2023	07-25-2023	207	0.0	207	12
			T2		--	--	--	0	0.0	0	12
			T1		--	--	--	0	0.0	0	12
			S6		--	--	--	0	0.0	0	12
			S4		--	--	--	0	0.0	0	12
			MA		--	--	--	0	0.0	0	12
			M9		--	--	--	0	0.0	0	12
			M8		--	--	--	0	0.0	0	12
			M7		--	--	--	0	0.0	0	12
			M6		--	--	--	0	0.0	0	12
			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.

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## 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

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 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 PMIS Maintenance

**Log on to the next year.**

1. Delete next year PMIS.

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

Utilities > Mass Delete Forecast Positions

Position Management

Execute

Year: N

Select Positions only (P), Supplements only (S) or blank for ALL:

Select Position Statuses or blank for ALL:

Select Position School Years or blank for ALL:

Select First Pay Date Codes or blank for ALL:

Select Extra Duty Codes or blank for ALL:

Select Positions or blank for ALL:  
(Includes ALL billets for selected positions  
Blank for ALL not processed when Positions/Billets selected)

Select Positions/Billets or blank for ALL:

Select Supplement Positions or blank for ALL:  
(Includes ALL billets for selected supplement positions  
Blank for ALL not processed when Supplements/Billets selected)

Select Supplement Positions/Billets or blank for ALL:

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

Utilities > Mass Delete Forecast Positions

Position Management

Process

Cancel

Processing Reports

Select	Report Name
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions Process Error Listing
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions by Employee Name
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions by Campus
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions by Position/Billet

Generate Reports

Select All

Unselect All

- 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

Execute

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

Process Cancel

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

Generate Reports Select All Unselect All

- 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.

The screenshot displays the 'Update Fiscal Year by Fund' utility interface. At the top, there is a green navigation bar with a home icon, the text 'Utilities > Update Fiscal Year by Fund', and a dropdown menu for 'Position Management'. Below the navigation bar, there are two buttons: 'Retrieve' and 'Execute'. A black arrow points to the 'Execute' button. The main content area is titled 'UPDATE FISCAL YEAR BY FUND' and 'Increment Fiscal Year by 1'. A table with columns 'Increment' and 'Fund/Year' is visible, containing rows with checkboxes and values like '199/3', '211/3', '240/3', '255/3', and '282/3'.

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

**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 &gt; Maintenance &gt; 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:

Reports > User Created Reports > CYR/NYR Positions Position Management

Save Create Report Delete Reset Year: C Frequency: 6

Employee Nbr:

Position Nbr:

**PMIS Position/Distribution Export File Auto Select Options**

PMIS Position Control  PMIS Position Distribution

**PMIS Position Control**

<input type="checkbox"/> CYR/NYR Flag	<input type="checkbox"/> Contract Beg Date	<input type="checkbox"/> Day Empld Pct	<input type="checkbox"/> Extra Duty Code	<input type="checkbox"/> Inactive Reason Code	<input type="checkbox"/> Occ Pay Type
<input checked="" type="checkbox"/> Position Nbr	<input type="checkbox"/> Contract End Date	<input type="checkbox"/> Pct of Year	<input type="checkbox"/> Supplement Type	<input type="checkbox"/> Vacate Reason	<input type="checkbox"/> Suppl Recalculate
<input checked="" type="checkbox"/> Billet Nbr	<input type="checkbox"/> Payoff Date	<input type="checkbox"/> Pay Concept	<input type="checkbox"/> Supplement Max Amt	<input type="checkbox"/> Pay Grade	<input type="checkbox"/> Ign Pct Day For Sal Calcs
<input checked="" type="checkbox"/> Position Type	<input type="checkbox"/> Nbr Days Off	<input type="checkbox"/> EEOC Code	<input type="checkbox"/> Base Suppl On Dly Rate	<input type="checkbox"/> Pay Step	<input type="checkbox"/> Ign Pct Yr For Sal Calcs
<input type="checkbox"/> Position Description	<input type="checkbox"/> Act Hrlly Dly Rate	<input type="checkbox"/> Workers' Comp	<input type="checkbox"/> Supplement Pay 1 Time	<input type="checkbox"/> Pay Schedule	<input type="checkbox"/> New Employee
<input checked="" type="checkbox"/> Position Status	<input type="checkbox"/> Salary Amount	<input type="checkbox"/> TRS Position Code	<input type="checkbox"/> Date Supplement 1 Time	<input type="checkbox"/> FTE - Equiv Units	
<input type="checkbox"/> Position School Year	<input checked="" type="checkbox"/> Nbr Remain Payments	<input type="checkbox"/> Max Days	<input type="checkbox"/> Accept Change	<input type="checkbox"/> Midpoint Base	
<input type="checkbox"/> Frequency	<input type="checkbox"/> Job Category	<input type="checkbox"/> Max Payments	<input type="checkbox"/> Date Create/Update	<input type="checkbox"/> Percent of Midpoint	
<input type="checkbox"/> Occ Employee Nbr	<input type="checkbox"/> Supplement Attached	<input type="checkbox"/> Ovtm Elig Flg	<input type="checkbox"/> Date Fill	<input type="checkbox"/> Unemployment Elig Flag	
<input type="checkbox"/> Primary Job	<input type="checkbox"/> Job Code	<input type="checkbox"/> State Minimum Days	<input type="checkbox"/> Date Fill Position Reason	<input type="checkbox"/> FICA Elig	
<input checked="" type="checkbox"/> Increase Elig	<input type="checkbox"/> 1st Pay Date Code	<input type="checkbox"/> Spvsr Position Nbr	<input type="checkbox"/> Date Criteria	<input type="checkbox"/> TRS Status Code	
<input type="checkbox"/> Occ Pay Grade	<input type="checkbox"/> Calendar Code	<input type="checkbox"/> Spvsr Billet Nbr	<input type="checkbox"/> Date Authorization	<input type="checkbox"/> Budget Amount	
<input type="checkbox"/> Occ Pay Step	<input type="checkbox"/> Campus ID	<input type="checkbox"/> Supplement Extra Days	<input type="checkbox"/> Date Authorization End	<input type="checkbox"/> Budget Salary Override	
<input type="checkbox"/> Occ Pay Schedule	<input type="checkbox"/> Dept	<input type="checkbox"/> Suppl to Pos Nbr	<input type="checkbox"/> Date Entry	<input type="checkbox"/> Actual/Budget Ind	
<input type="checkbox"/> State Step	<input type="checkbox"/> Hrs Per Day	<input type="checkbox"/> Suppl to Pos Billet	<input type="checkbox"/> Date Inactive	<input type="checkbox"/> Pay Type	

**PMIS Position Distribution**

<input type="checkbox"/> CYR/NYR Flag	<input type="checkbox"/> Job Code	<input type="checkbox"/> Function	<input type="checkbox"/> Ed Span	<input type="checkbox"/> Expense 373
<input type="checkbox"/> Position Nbr	<input type="checkbox"/> Account Type	<input type="checkbox"/> Object	<input type="checkbox"/> Project Detail	<input type="checkbox"/> Contrib Acct Flag
<input type="checkbox"/> Billet Nbr	<input type="checkbox"/> Pay Activity	<input type="checkbox"/> Sub Object	<input type="checkbox"/> Account Amount	
<input type="checkbox"/> Position Type	<input type="checkbox"/> Workers' Comp	<input type="checkbox"/> Organization	<input type="checkbox"/> Account Percent	
<input type="checkbox"/> Distribution Sequence	<input type="checkbox"/> File ID	<input type="checkbox"/> Fiscal Year	<input type="checkbox"/> TRS Grant Code	
<input type="checkbox"/> Frequency	<input type="checkbox"/> Fund	<input type="checkbox"/> Program Intent	<input type="checkbox"/> Extra Duty Code	

**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="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 checked="" 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	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.

The screenshot shows the 'PMIS Position Modify' interface. At the top, there is a 'Save' button and a breadcrumb trail: 'Maintenance > PMIS Position Modify'. Below this, there are input fields for 'Position Number' (PTEACHER) and 'Position Description' (TEACHER), with a 'Retrieve' button. A table displays position records with columns: Details, Billet, Sch YR, Description, Status, Freq, Emp Nbr, First Name, Middle Name, Last Name, and Gen. The table has 6 rows, with the 4th row (Billet 00103, Description ARTS, Status A, Freq F, Emp Nbr 001185) highlighted in green. Below the table are navigation buttons: 'First', '1 / 6', and 'Last'. Underneath the table are tabs for 'POSITION RECORD', 'DISTRIBUTION', 'DATE', and 'BUDGET'. The 'Occupant' section contains a 'Primary Job' field with 'Increase Eligible' checked and 'New Employee' checked. Below this are fields for '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), and 'Remaining Payments' (12). The 'Position' section includes 'Accept Changes' checked, 'Status' (A - Active), 'Frequency' (F - Monthly NYR), and 'School Year' (2024). It also has a 'Calculate Salary' button. Other fields include '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), 'Max Days' (183.0), 'Max Payments' (12), 'Overtime Eligible', 'Supervisor Position', 'Billet', and 'Employee Number/Name'. At the bottom, there are checkboxes for 'Ignore Pct of Day for Salary Calcs' and '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: 5D ; Pay Step/State Step:  Non-Contracted emp FTE: 1.0

Midpoint Base: D - Midpoint Plus Percent of Midpoint: 0.00

Unemployment Eligible:  FICA/Medicare Eligible: M - Subject to medicare TRS Status: 5 - Retired

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## Update NYR Positions and Move Employees to CYR Payroll

### 12-month Employees

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### 11-month Employees

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### 10-month Employees

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## Interface to Budget Checklist

[Checklist](#)



## Back Cover