

ASCENDER - Position Management: Set up New Hires

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PMIS - Setup for New Hires

This guide provides users with the necessary steps to set up new hires in the Position Management Information System (PMIS).

This document assumes that you are familiar with the basic features of the TxEIS Business System and have reviewed the TxEIS Business Overview guide.

Before You Begin

Address District Administration settings.

District Administration > Options > Position Management

The following fields are used to:

- Prevent salary calculations on the employee's job info record.
- Prevent an employee from being entered without a position in PMIS.

Use PMIS	Select to enable Position Management options and functionality. Do not select this option until you are ready to fully utilize Position Management. If selected: The **Automatically Compute** options (**Pay Rate**, **Daily Rate**, **Dock Rate**, **Accrual Rate**, and **Overtime Rate**) on the Payroll or Personnel > Tables > District HR Options page are cleared and disabled. The **Calculate** button is disabled on the Payroll > Maintenance > Staff Job/Pay Data > Job Info tab as calculations are not allowed on the employee's job info record.
Employee Must Be Assigned a Position Prior to Creating a Payroll Record	Select to indicate if an employee must be assigned a position through PMIS before a payroll record is created. Do not select this option until you are ready to fully utilize PMIS. If selected, the payroll department is restricted to setting up new employees with a pay type 4 code (substitute).
(Optional) Round Salary to Nearest Whole Dollar	Select to round the salary to the nearest whole dollar when it is calculated. **Example**: If the daily rate x number of days = $49,999.68, the salary is rounded to $50,000. **Note**: LEAs who prefer the monthly pay rate to be rounded to the nearest dollar for their employees should select this field. If the LEA prefers to see the monthly amount calculated to the penny, do not select this field. This will not affect salaries for budgeting purposes. The Salary Simulation provides an option to round to the nearest dollar when calculating budget amounts.

District Administration > Tables > PMIS > Action Reason

This page is used to create and maintain a list of two-digit action reason codes to be used throughout the Position Management.

- Action reason codes represent the reason for a change in compensation (CIC).
- An action reason code is required each time a change in compensation (CIC) is processed.
- Codes 01-05 are automatically populated by the system and cannot be changed or deleted.
- All other codes are LEA-defined.

Action reason 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 the action reason codes.

Set up a Late Start New Hire

The Change in Compensation (CIC) function is used for the following reasons:

- Set up new hires.
- Process any type of change from one position to another (e.g., promotion, demotion).
- Process a data correction.

Complete the following steps to set up a new employee who starts late in the school year.

1. Create a staff demographic record.

   Personnel > Maintenance > Staff Demo > Demographic Information

   Create a staff demographic record for the new employee. The employee must have an employee number prior to being added to Position Management.

2. Perform the Change in Compensation (CIC).

   Position Management > Maintenance > PMIS Change in Position > Change in Compensation

   This page is used to change the position(s) and compensation amount(s) that are currently assigned to an employee. Existing positions and supplements can be added or removed from existing employees. In addition, you can assign an existing position to a new employee or add an additional position to an existing employee.

   When a Change in Compensation (CIC) transaction is approved, the previous job record is updated with the payoff amounts and information, and a new job record is inserted with the associated distributions. If the CIC is for a new hire, only the new information is inserted.

   ❑ Complete the following fields:

Pay Frequency	Click ⌄ to select a pay frequency.
Employee	Begin typing the employee name or number that was generated on the Staff Demo page. Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click **Retrieve**. Or, click Directory to perform a search in the Employees Directory.
Effective Dt	Type the new employee's start date in the MMDDYYYY format.
Action Reason	Select an action reason code. The action reasons codes are maintained on the District Administration > Tables > PMIS > Action Reason page.

❑ Click **Retrieve**. The retrieved page is blank since the employee is a new hire and is not currently assigned to a position.

❑ Click **Notes** to enter any CIC details. The notes can be used as a form of communication between the personnel and payroll departments. The notes are displayed on the Payroll > Maintenance > Approve CIP Transaction page under **CIP Notes**.

❑ Click **Next**. The New Positions page is displayed allowing you to assign an employee to a vacant position. Be sure to have the new employee's pay grade, pay step, end date, and payoff date available when updating this tab.

❑ Click **+Add** to add a position to the employee's record. Click ⋮ next to the position number. A list of the LEA's vacant positions is displayed. Select the position to be assigned to the employee.

> **Note**: If a vacant position at the LEA is not displayed in the list, verify that the distribution code (fiscal year), pay grade, etc. for the position is correct. Additionally, be sure to review the current year first pay date codes on the District Administration > Tables > PMIS > First Pay Date > Current Year tab for accuracy. Positions with incorrect information are not displayed in the list.

❑ Complete the following fields:

Primary Job	Select if this is the primary job for the employee. An employee may have only one primary job.
Pay Grade	Click ⋮ to select the pay grade at which the employee is paid. The field is used to identify the correct salary amount on the salary table.
Pay Step	Click ⋮ select the pay step at which the employee is paid. The field is used to identify the correct salary amount on the salary table.
Schedule	Click ⋮ select the local sub schedule of the employee's pay grade and step. The field is used to identify the correct salary amount on the salary table.
State Step	Type the state step that the employee has earned based on years of service plus career ladder step(s), if applicable.
End Date	Type the ending date for the calendar selected in the MMDDYYYY format.
Payoff Date	Type the date on which the employee's contract is paid off in the MMDDYYYY format. When this date and the pay date match, contract payoff occurs.

Remaining Payments	Type the number of payments remaining to be made to the employee during the current contract period.

❑ Click **Calculate** to calculate the employee's salary. The reflected salary is calculated as if the employee worked the full year. The pro-rated salary is reflected in the salary letter in the following steps.



TIP: It is only necessary to populate the **Hourly/Daily Rate** if the employee is tied to a midpoint table. The field is automatically calculated and populated for employees with a **Local Annual** or **Hourly/Daily** salary schedule.

❑ Click **Next**. The Current Supplements page is displayed with a list of the employee's current supplements; however, the page is blank since the employee is a new hire.

❑ Click **Next**. The New Supplements page is displayed. If applicable, add supplements on this page.

❑ Click **+Add** to add a supplement. Click the ⋮ next to the position number. A list of the LEA's vacant supplement positions is displayed. Select the supplement to be added to the employee's record.

Remaining Payments	Type the number of remaining payments to be made to the employee during the current contract period.

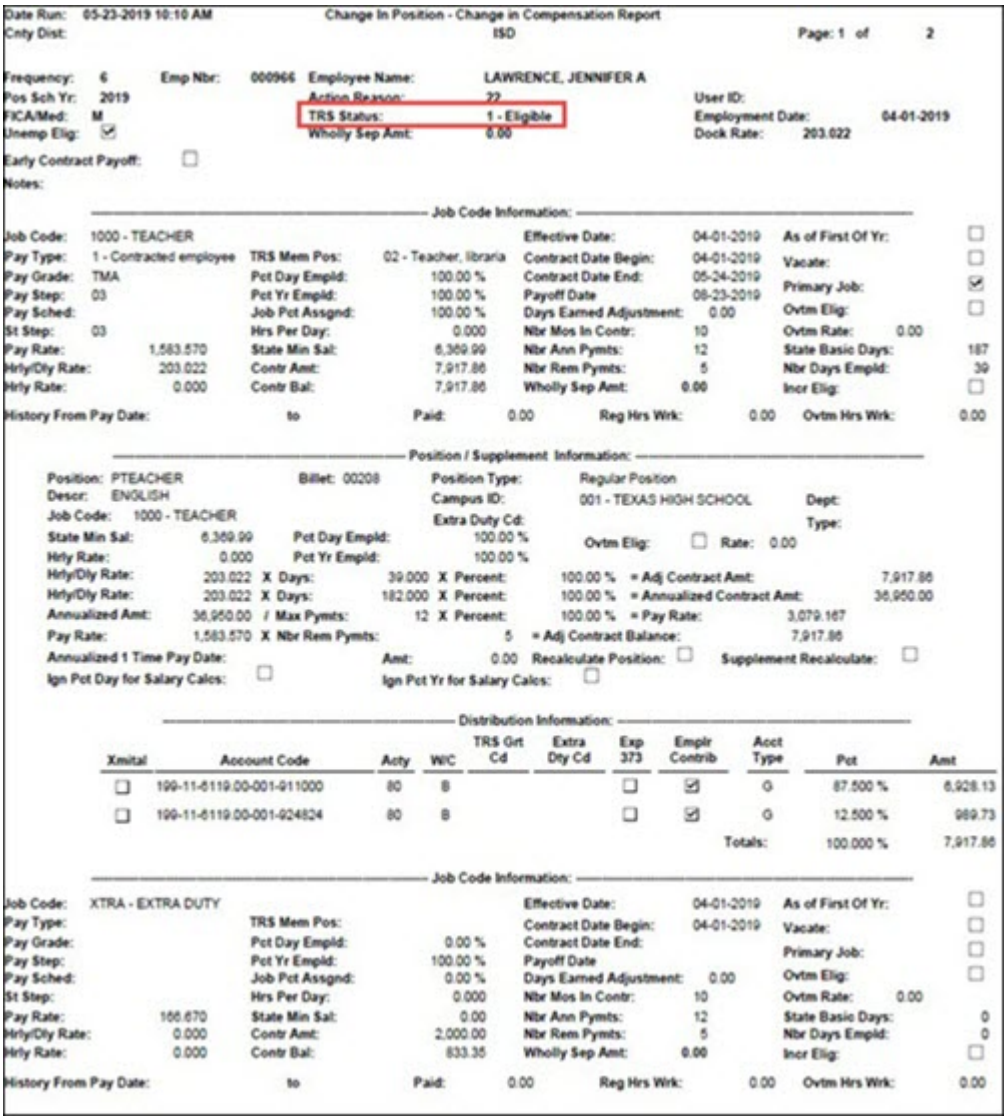
Notes:

- The supplement amount is divided by the number of pay periods in a year and that amount is multiplied by the remaining payments to calculate the annual amount for employees who start late in the year. The **Supplement Pay Amount** on this page can be modified, if needed.
- If the supplement is a G account type in the extra duty table, contact your regional ESC consultant for assistance before proceeding.

❑ Click **Execute**. The Change in Position - Change in Compensation Report is displayed. Verify the report for accuracy. This report can be used as the salary letter and reviewed with the employee. A list of all of the fields that are updated after the changes are approved and processed is listed in step 3.

The TRS eligibility status comes from the Budget tab on the position. If the employee is not TRS-eligible or is retired and the report reflects otherwise, cancel the process and change the **TRS Status** on the Budget tab for the position.

Primary Position



Date Run: 05-23-2019 10:10 AM — Change In Position - Change in Compensation Report — Page: 1 of 2
Cnty Dist: — ISD

Frequency: 6 — Emp Nbr: 000966 — Employee Name: LAWRENCE, JENNIFER A
Pos Sch Yr: 2019 — Action Reason: 22 — User ID:
FICA/Med: M — TRS Status: 1 - Eligible — Employment Date: 04-01-2019
Unemp Elig: ☑ — Wholly Sep Amt: 0.00 — Dock Rate: 203.022
Early Contract Payoff: ☐
Notes:

Job Code Information:

Job Code:	1000 - TEACHER			Effective Date:	04-01-2019	As of First Of Yr:	☐
Pay Type:	1 - Contracted employee	TRS Mem Pos:	02 - Teacher, libraria	Contract Date Begin:	04-01-2019	Vacate:	☐
Pay Grade:	TMA	Pct Day Empld:	100.00 %	Contract Date End:	05-24-2019	Primary Job:	☑
Pay Step:	03	Pct Yr Empld:	100.00 %	Payoff Date	08-23-2019	Ovtm Elig:	☐
Pay Sched:		Job Pct Assgnd:	100.00 %	Days Earned Adjustment:	0.00		
St Step:	03	Hrs Per Day:	0.000	Nbr Mos In Contr:	10	Ovtm Rate:	0.00
Pay Rate:	1,583.570	State Min Sal:	6,369.99	Nbr Ann Pymts:	12	State Basic Days:	187
Hrly/Dly Rate:	203.022	Contr Amt:	7,917.86	Nbr Rem Pymts:	5	Nbr Days Empld:	39
Hrly Rate:	0.000	Contr Bal:	7,917.86	Wholly Sep Amt:	0.00	Incr Elig:	☐

History From Pay Date: — to — Paid: 0.00 — Reg Hrs Wrk: 0.00 — Ovtm Hrs Wrk: 0.00

Position / Supplement Information:

Position:	PTEACHER	Billet: 00208	Position Type:	Regular Position			
Descr:	ENGLISH		Campus ID:	001 - TEXAS HIGH SCHOOL		Dept:	
Job Code:	1000 - TEACHER		Extra Duty Cd:			Type:	
State Min Sal:	6,369.99	Pct Day Empld:	100.00 %	Ovtm Elig:	☐	Rate: 0.00	
Hrly Rate:	0.000	Pct Yr Empld:	100.00 %				
Hrly/Dly Rate:	203.022	X Days:	39.000	X Percent:	100.00 %	= Adj Contract Amt:	7,917.86
Hrly/Dly Rate:	203.022	X Days:	182.000	X Percent:	100.00 %	= Annualized Contract Amt:	36,950.00
Annualized Amt:	36,950.00	/ Max Pymts:	12	X Percent:	100.00 %	= Pay Rate:	3,079.167
Pay Rate:	1,583.570	X Nbr Rem Pymts:	5	= Adj Contract Balance:			7,917.86
Annualized 1 Time Pay Date:		Amt:	0.00	Recalculate Position:	☐	Supplement Recalculate:	☐
Ign Pct Day for Salary Calcs:	☐	Ign Pct Yr for Salary Calcs:	☐				

Distribution Information:

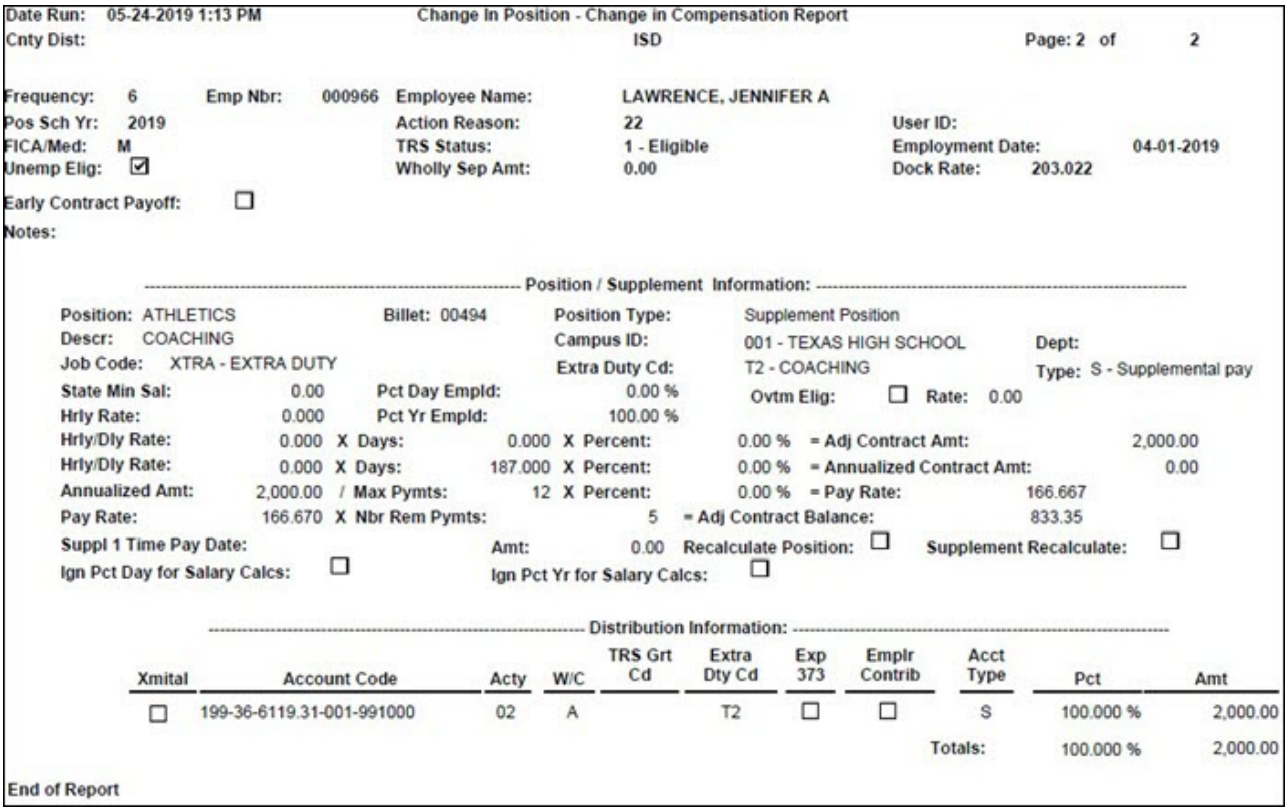
Xmital	Account Code	Acty	WC	TRS Grt Cd	Extra Dty Cd	Exp 373	Emplr Contrib	Acct Type	Pct	Amt
☐	199-11-6119.00-001-911000	80	B			☐	☑	G	87.500 %	6,928.13
☐	199-11-6119.00-001-924824	80	B			☐	☑	G	12.500 %	989.73
								Totals:	100.000 %	7,917.86

Job Code Information:

Job Code:	XTRA - EXTRA DUTY			Effective Date:	04-01-2019	As of First Of Yr:	☐
Pay Type:		TRS Mem Pos:		Contract Date Begin:	04-01-2019	Vacate:	☐
Pay Grade:		Pct Day Empld:	0.00 %	Contract Date End:		Primary Job:	☐
Pay Step:		Pct Yr Empld:	100.00 %	Payoff Date		Ovtm Elig:	☐
Pay Sched:		Job Pct Assgnd:	0.00 %	Days Earned Adjustment:	0.00		
St Step:		Hrs Per Day:	0.000	Nbr Mos In Contr:	10	Ovtm Rate:	0.00
Pay Rate:	166.670	State Min Sal:	0.00	Nbr Ann Pymts:	12	State Basic Days:	0
Hrly/Dly Rate:	0.000	Contr Amt:	2,000.00	Nbr Rem Pymts:	5	Nbr Days Empld:	0
Hrly Rate:	0.000	Contr Bal:	833.35	Wholly Sep Amt:	0.00	Incr Elig:	☐

History From Pay Date: — to — Paid: 0.00 — Reg Hrs Wrk: 0.00 — Ovtm Hrs Wrk: 0.00

Supplement Position



Date Run: 05-24-2019 1:13 PM — Change In Position - Change in Compensation Report
Cnty Dist: — ISD — Page: 2 of 2

Frequency: 6 — Emp Nbr: 000966 — Employee Name: LAWRENCE, JENNIFER A
Pos Sch Yr: 2019 — Action Reason: 22 — User ID:
FICA/Med: M — TRS Status: 1 - Eligible — Employment Date: 04-01-2019
Unemp Elig: ☑ — Wholly Sep Amt: 0.00 — Dock Rate: 203.022
Early Contract Payoff: ☐
Notes:

Position / Supplement Information:

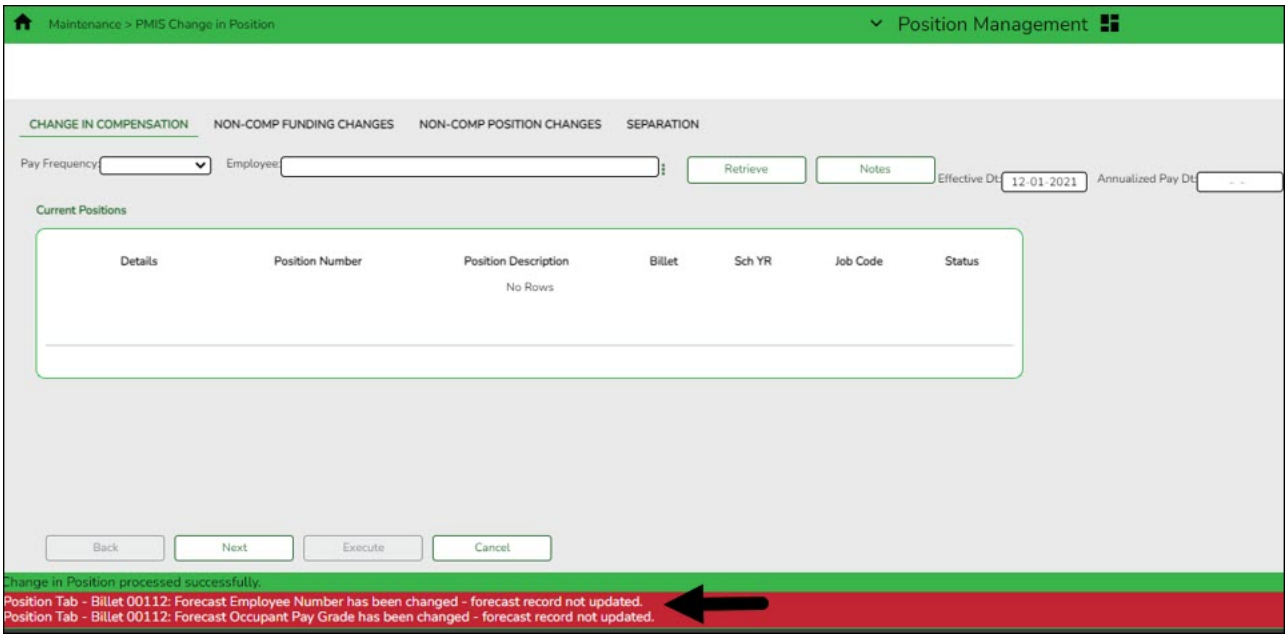
Position: ATHLETICS — Billet: 00494 — Position Type: Supplement Position
Descr: COACHING — Campus ID: 001 - TEXAS HIGH SCHOOL — Dept:
Job Code: XTRA - EXTRA DUTY — Extra Duty Cd: T2 - COACHING — Type: S - Supplemental pay
State Min Sal: 0.00 — Pct Day Empld: 0.00 % — Ovtm Elig: ☐ — Rate: 0.00
Hrly Rate: 0.000 — Pct Yr Empld: 100.00 %
Hrly/Dly Rate: 0.000 X Days: 0.000 X Percent: 0.00 % = Adj Contract Amt: 2,000.00
Hrly/Dly Rate: 0.000 X Days: 187.000 X Percent: 0.00 % = Annualized Contract Amt: 0.00
Annualized Amt: 2,000.00 / Max Pymts: 12 X Percent: 0.00 % = Pay Rate: 166.667
Pay Rate: 166.670 X Nbr Rem Pymts: 5 = Adj Contract Balance: 833.35
Suppl 1 Time Pay Date: — Amt: 0.00 — Recalculate Position: ☐ — Supplement Recalculate: ☐
Ign Pct Day for Salary Calcs: ☐ — Ign Pct Yr for Salary Calcs: ☐

Distribution Information:

Xmital	Account Code	Acty	W/C	TRS Grt Cd	Extra Dty Cd	Exp 373	Emplr Contrib	Acct Type	Pct	Amt
☐	199-36-6119.31-001-991000	02	A		T2	☐	☐	S	100.000 %	2,000.00
								Totals:	100.000 %	2,000.00

End of Report

Messages similar to the below are displayed if the current year position was updated and the next year position was not updated. If the new employee should be added to the next year PMIS, change to the next year payroll frequency and add the new employee to the position.



3. Approve a CIP transaction.

   Payroll > Maintenance > Approve CIP Transaction

   After the Change in Position - Change in Compensation Report is processed, the information is displayed on the Payroll > Maintenance > Approve CIP Transaction page, which is the final step before the employee record is updated on the Payroll > Maintenance > Staff Job/Pay Data page.

If the LEA has a personnel and payroll department, it is possible that the personnel department submitted the information on the Change in Position - Change in Compensation page. This step allows the payroll department to review the salary calculation for the employee and perform one of the following actions:

- **Mark Reviewed** - If the payroll department needs additional time to review the information before approving it, enter a date in the **Date Reviewed** field and click **Mark Reviewed**. This informs the personnel department that the payroll department is still reviewing the information.
- **Approve** - If you click **Approve**, the Staff Job/Pay Data fields from the position are updated. A message indicating that the transaction was approved is displayed.
- **Reject** - If the information is incorrect, click **Reject**. You are prompted to enter the rejection date and reason. Once an item is rejected, it must be reviewed on the Position Management > Maintenance > PMIS Payroll Rejections page. If you need to reverse and remove it from a pending status, click **Rollback**. All changes from the initial Change in Position request are reversed.

After the changes are approved and processed, the following pages/fields are updated.

Note: New employees are set up with a 90-day end date for TRS as if they do not have a TRS account. Verify and make corrections, if applicable.

Remember to verify all information and make any necessary changes. Also, note that State Min Salary **% Assigned** is 0. This field needs to be updated for professional employees who are subject to the statutory minimum.

Note: For LEAs that accrue, the accrual information is not entered on the position, it is based on the job code for that position and obtained from the job code table. Verify that the accrual code is accurate on the Payroll > Maintenance > Staff Job/Pay Data page.

This process builds the **Days Earned** field to modify accruals on the Payroll > Maintenance > Hours/Pay Transmittals > Abs Ded tab if needed.

Additional Updates/Verification


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