



# pmis\_district\_admin



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# 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 calculation types used in PMIS and the default values to be used for certain types of PMIS transactions. Typically, these options do not change throughout the school year.

Update the following fields:

- **Current Year**
- **Next Year**
- **Minimum Foundation Year**

Click **Save**.

## 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.

Tables > PMIS > Category District Administration

Save

**CATEGORY**

Starting Category Code:

| Delete                                | Category Code                     | Category Description                                 |
|---------------------------------------|-----------------------------------|--|
| <input type="button" value="Delete"/> | <input type="text" value="0001"/> | <input type="text" value="ACCELERATED INSTRUCTION"/> |
| <input type="button" value="Delete"/> | <input type="text" value="0002"/> | <input type="text" value="BILINGUAL EDUCATION"/>     |
| <input type="button" value="Delete"/> | <input type="text" value="0003"/> | <input type="text" value="STUDENT ASSESSMENT"/>      |
| <input type="button" value="Delete"/> | <input type="text" value="0004"/> | <input type="text" value="SPECIAL ED AIDE"/>         |

### 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.

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             |
|--------|---------------------|----------------|-------------------------|
|        | 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**

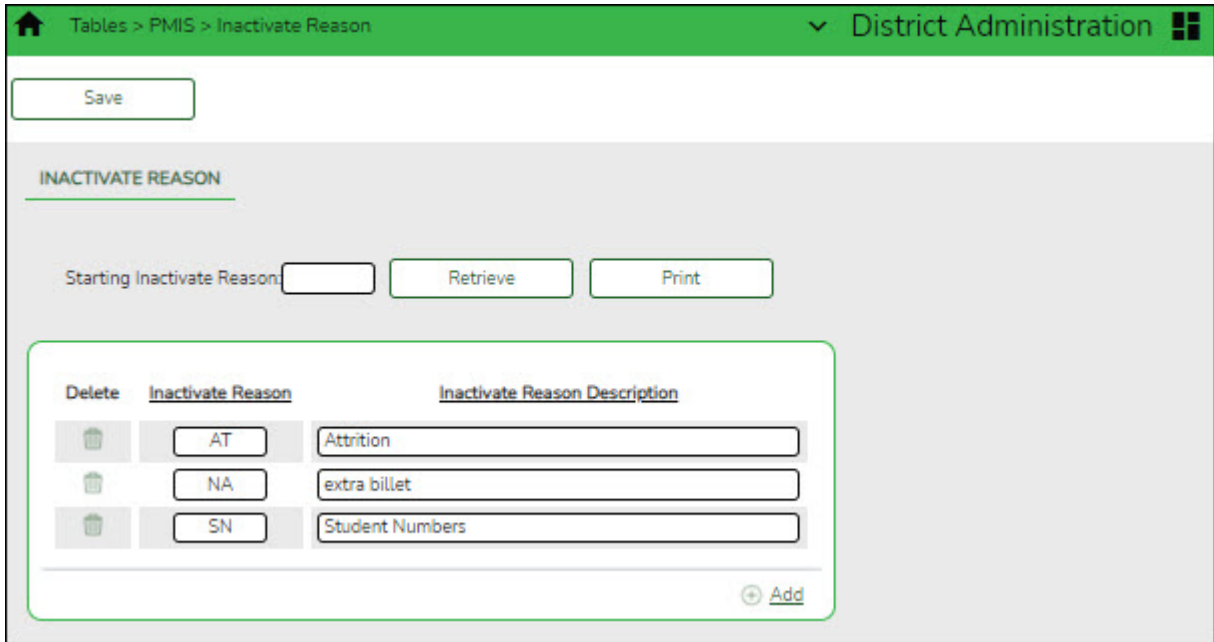
Starting Action Reason:

| 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" value=""/> ::   |  |
|        | <input type="text" value="02"/> | <input type="text" value="CHANGE IN POSITION INFO (SYS)"/> | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="03"/> | <input type="text" value="EMPLOYEE MOVED INTO POS (SYS)"/> | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="04"/> | <input type="text" value="AS OF END-OF-YEAR (SYS)"/>       | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="05"/> | <input type="text" value="AS OF FIRST-OF-YEAR (SYS)"/>     | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="06"/> | <input type="text" value="Resigned"/>                      | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="07"/> | <input type="text" value="Promotion"/>                     | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="08"/> | <input type="text" value="Remove Supplement"/>             | <input type="text" value=""/> ::   |  |
|        | <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" value=""/> ::   |  |
|        | <input type="text" value="11"/> | <input type="text" value="Lateral"/>                       | <input type="text" value=""/> ::   |  |
|        | <input type="text" value="12"/> | <input type="text" value="Demotion"/>                      | <input type="text" value=""/> ::   |  |

5. Set up inactive reason codes.

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

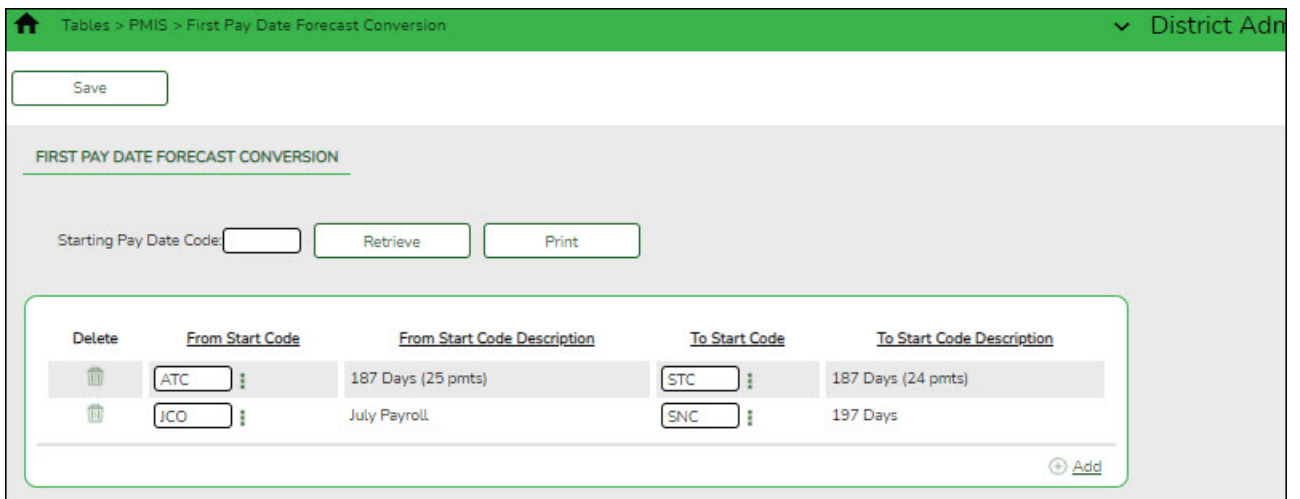
This page is used to create and maintain a list of inactive reason codes to be used for Position Management. When a position is changed to inactive status, you are prompted to enter a reason, which is saved in the historical records.



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.



7. Update the 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.

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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.

Tables>PMIS>First Pay Date Complete the Current Year tab with the First Pay Dates of the current year, and the Next Year tab with the First Pay Dates that will be used for next year.

Tables>PMIS>Forecast Conversion NOTE: Calendars must be set up in Next Year Payroll files and Pay Dates for the new year must be entered before completing this step.

Enter the next year begin and end date dates (must match new calendars in NYR PR) and the payoff dates (must exist in Pay Dates table) for each First Pay Date Code. This process updates the table, and replaces the mass updating process we would normally do in NYR PR. The following steps will need to be completed to make this change to each position.

Delete NYR PMIS Human Resources>NY Frequency>Utilities>PMIS>Mass Delete Forecast Positions Leave all fields blank and Execute Print or save reports and Process. Create the export when prompted.

Copy current year positions to next year Human Resources>NY Frequency>Utilities>PMIS>Create Forecast Positions Execute with all fields selected Generate reports. Verify errors and make corrections, if necessary. Click Process. Create the export when prompted

Update the fiscal year for distributions Human Resources>NY Frequency>Utilities>PMIS>Update Fiscal Year by Fund

This process will increment the fiscal year reflected on the Position Distribution by 1.

Generate the Position Listing by Campus Report from NYR PMIS. Reports>PMIS Reports>Position Listing by Campus HRS8050

Use this report to determine if any employees need to be moved to a different position, if you have vacant positions you need to update with employee information, or if you have any supplemental positions that need to be updated for stipends.

Update Positions and Supplement Positions as needed Human Resources>NY Frequency>Maintenance>PMIS Position Modify or PMIS Supplement Modify

Generate the PMIS/Payroll Discrepancy report to determine if you have active employees that have not been assigned to a forecast position.

Verify the "Increase Eligible" field for positions with a PMIS User Created Report. Employees that were new to the district last year may not have it selected. You will need to select this field for them if they will be eligible for an increase when running simulations for the new school year. As new employees are placed in positions, deselect this field on their position. Remember that the step in NYR PMIS reflects the same pay step that is reflected in CYR. HR>Maintenance>PMIS Position Modify - Position

## Record and Increase Eligible



## Back Cover