



pmis_maintenance_section

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Log on to the next year.

1. Delete next year PMIS.

Position Management > Utilities > Mass Delete Forecast Positions

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

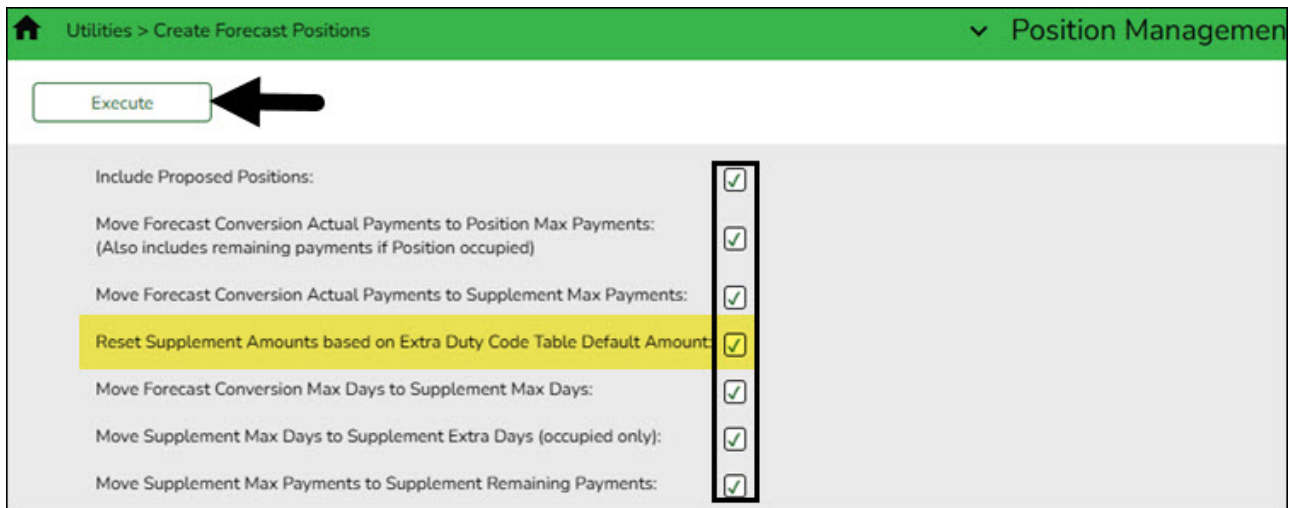
Select	Report Name
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions Process Error Listing
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions by Employee Name
<input checked="" type="checkbox"/>	Mass Delete Forecast Positions by Campus
<input checked="" type="checkbox"/>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

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

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

2. Copy current year positions to the next year.

Position Management > Utilities > Create Forecast Positions



Utilities > Create Forecast Positions Position Management

Include Proposed Positions:

Move Forecast Conversion Actual Payments to Position Max Payments:
(Also includes remaining payments if Position occupied)

Move Forecast Conversion Actual Payments to Supplement Max Payments:

Reset Supplement Amounts based on Extra Duty Code Table Default Amount

Move Forecast Conversion Max Days to Supplement Max Days:

Move Supplement Max Days to Supplement Extra Days (occupied only):

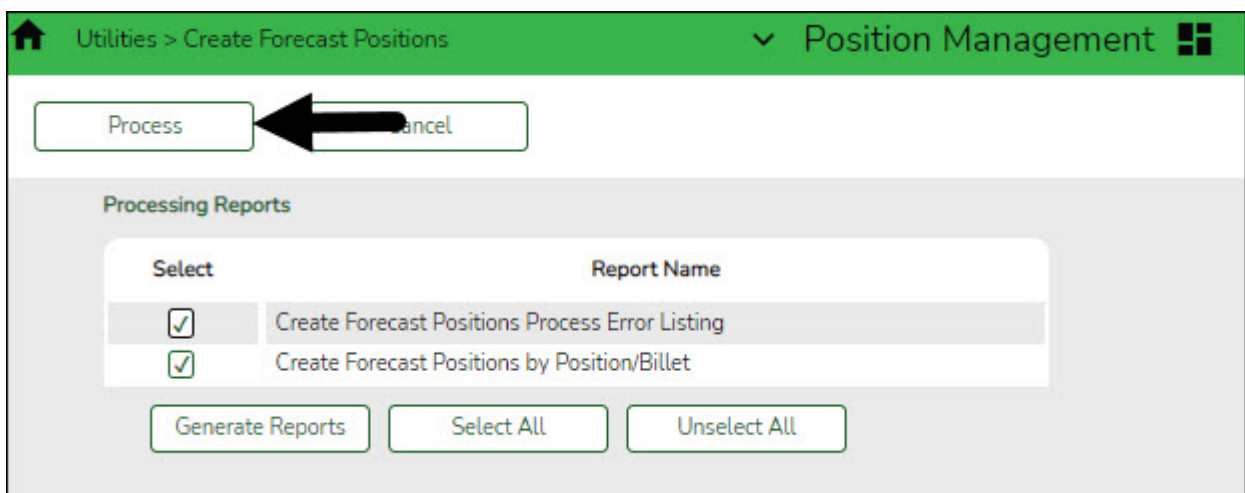
Move Supplement Max Payments to Supplement Remaining Payments:



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

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

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



Utilities > Create Forecast Positions Position Management

Processing Reports

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

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

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

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

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

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

Utilities > Update Fiscal Year by Fund Position Management

Retrieve Execute

UPDATE FISCAL YEAR BY FUND

Increment Fiscal Year by 1

Increment	Fund/Year
<input type="checkbox"/>	199/3
<input type="checkbox"/>	211/3
<input type="checkbox"/>	240/3
<input type="checkbox"/>	255/3
<input type="checkbox"/>	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 > Maintenance > PMIS Position Modify or PMIS Supplement Modify



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	

- o Retrieve the employee's position record.
- o Select the **Vacate** check box for each position.
- o 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 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 a list of 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: ; Pay Step/State Step: Non-Contracted emp FTE:

Midpoint Base: Plus Percent of Midpoint:

Unemployment Eligible: FICA/Medicare Eligible: TRS Status:



Back Cover