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pmis_updatingnyrpositions_and_rolling12moemployees

Table of Contents

This process moves employees who receive their first paycheck in July from next year Position Management to current year Position Management. It also updates some of the fields on the following Maintenance tabs in the current year (see step 7 for detailed information):

- Employment Info
- Pay Info
- Job Info
- Distributions

A separate simulation needs to be set up for employees who receive their first paycheck in July. This is necessary because the position in the next year Position Management reflects the current year's salary information. The simulation updates the fields in the next year positions for the new school year and clears the **Accept Changes** field. The new salary information from the next year position is updated in the current year, updating both the current year Position Management and the Staff Job/Pay Data fields for those employees. As 12-month employees do not accrue, it is not necessary to move them to the next year payroll. Contact your regional ESC consultant to discuss moving 12-month employees to the next year payroll.

Note: Depending on the LEA, it may not be necessary to set up separate simulations. If the LEA has determined next year salaries and completed all interfacing to Budget for the year, one simulation can be used when moving employees. Contact your regional ESC consultant to discuss this option.

It is important to consider how this process affects the budget. If you update 12-month positions with the new salary amount for the next school year in the next year Position Management, running the simulation a second time at a later date for all employees gives the 12-month employees an additional increase. If you were unable to update the budget with accurate salaries for all employees prior to rolling 12-month employees, it is necessary to update Budget with multiple simulations. Reference the Interface to Budget Checklist.

The following checklist assumes the LEA has interfaced the payroll salaries to Budget using the Salary Simulation process in Position Management.

TIP: Be sure to complete service records and extract June TRS before continuing this process. This process updates the begin and end contract dates for 12-month employees in the current year payroll. Service records must reflect the begin and end dates from the current school year, and these dates are used to calculate the days and hours worked for TRS purposes. This process will overwrite the employee's calendar with the calendar for the new year. If June TRS has not been extracted, the system is unable to calculate this information for June.

1. Verify account code fiscal years.

   Position Management > Utilities > Update Fiscal Year by Fund

   Verify that the account code fiscal years are accurate. This tab provides a list of the fund/fiscal years that are set up in the positions. This process increments the position distribution fiscal year by 1.

> **Note**: Since the account codes are validated against the budget, there should not be any fiscal years less than the next year. If there are, generate a user-created report to identify the positions and manually update the information.

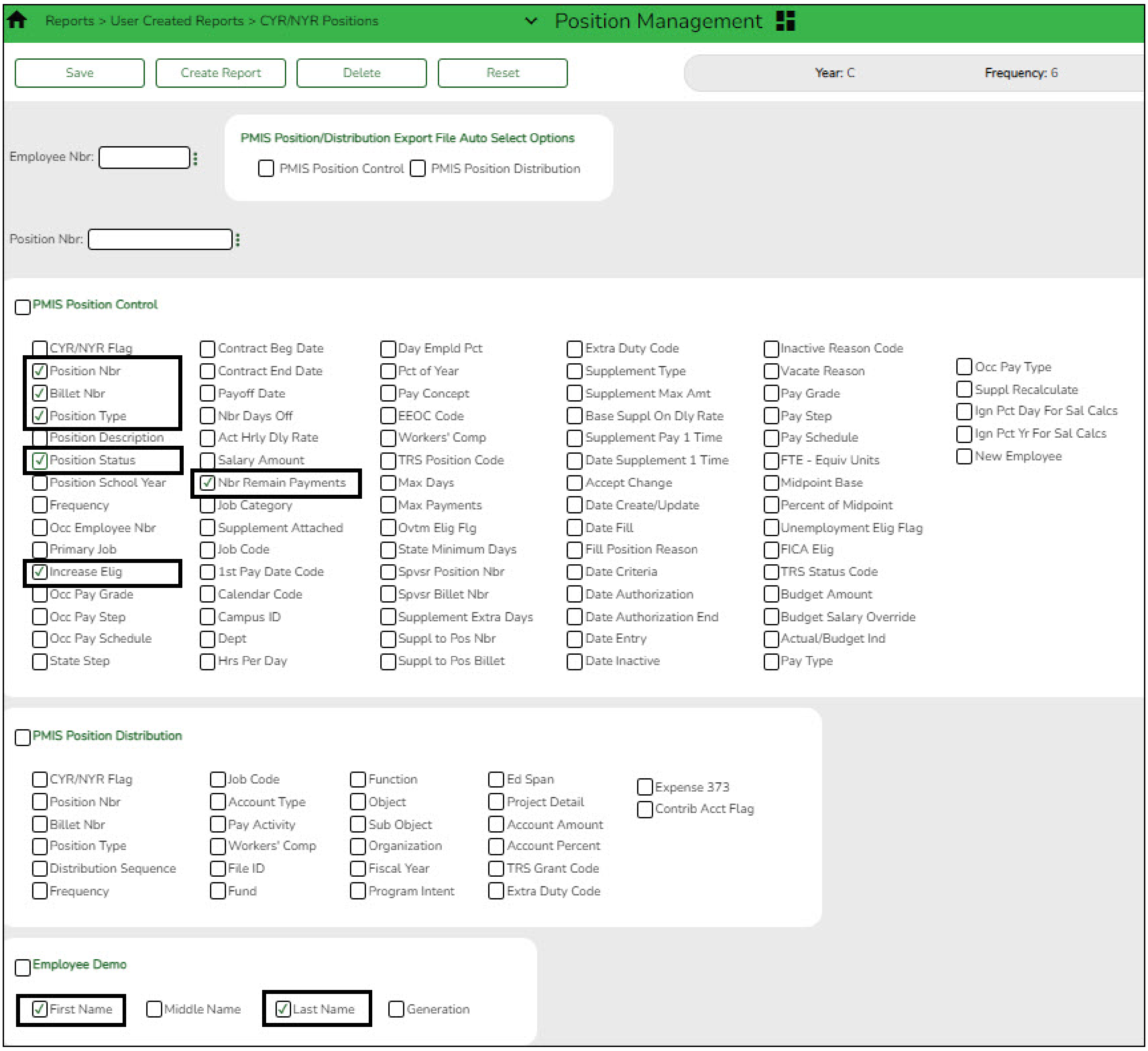
2. Generate a user-created report.

   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:



Year: C
Frequency: 6

Employee Nbr:

PMIS Position/Distribution Export File Auto Select Options
☐ PMIS Position Control ☐ PMIS Position Distribution

Position Nbr:

☐ PMIS Position Control

☐ CYR/NYR Flag
☑ Position Nbr
☑ Billet Nbr
☑ Position Type
☐ Position Description
☑ Position Status
☐ Position School Year
☐ Frequency
☐ Occ Employee Nbr
☐ Primary Job
☑ Increase Elig
☐ Occ Pay Grade
☐ Occ Pay Step
☐ Occ Pay Schedule
☐ State Step

☐ Contract Beg Date
☐ Contract End Date
☐ Payoff Date
☐ Nbr Days Off
☐ Act Hrly Dly Rate
☐ Salary Amount
☑ Nbr Remain Payments
☐ Job Category
☐ Supplement Attached
☐ Job Code
☐ 1st Pay Date Code
☐ Calendar Code
☐ Campus ID
☐ Dept
☐ Hrs Per Day

☐ Day Empld Pct
☐ Pct of Year
☐ Pay Concept
☐ EEOC Code
☐ Workers' Comp
☐ TRS Position Code
☐ Max Days
☐ Max Payments
☐ Ovtm Elig Flg
☐ State Minimum Days
☐ Spvsr Position Nbr
☐ Spvsr Billet Nbr
☐ Supplement Extra Days
☐ Suppl to Pos Nbr
☐ Suppl to Pos Billet

☐ Extra Duty Code
☐ Supplement Type
☐ Supplement Max Amt
☐ Base Suppl On Dly Rate
☐ Supplement Pay 1 Time
☐ Date Supplement 1 Time
☐ Accept Change
☐ Date Create/Update
☐ Date Fill
☐ Fill Position Reason
☐ Date Criteria
☐ Date Authorization
☐ Date Authorization End
☐ Date Entry
☐ Date Inactive

☐ Inactive Reason Code
☐ Vacate Reason
☐ Pay Grade
☐ Pay Step
☐ Pay Schedule
☐ FTE - Equiv Units
☐ Midpoint Base
☐ Percent of Midpoint
☐ Unemployment Elig Flag
☐ FICA Elig
☐ TRS Status Code
☐ Budget Amount
☐ Budget Salary Override
☐ Actual/Budget Ind
☐ Pay Type

☐ Occ Pay Type
☐ Suppl Recalculate
☐ Ign Pct Day For Sal Calcs
☐ Ign Pct Yr For Sal Calcs
☐ New Employee

☐ PMIS Position Distribution

☐ CYR/NYR Flag
☐ Position Nbr
☐ Billet Nbr
☐ Position Type
☐ Distribution Sequence
☐ Frequency

☐ Job Code
☐ Account Type
☐ Pay Activity
☐ Workers' Comp
☐ File ID
☐ Fund

☐ Function
☐ Object
☐ Sub Object
☐ Organization
☐ Fiscal Year
☐ Program Intent

☐ Ed Span
☐ Project Detail
☐ Account Amount
☐ Account Percent
☐ TRS Grant Code
☐ Extra Duty Code

☐ Expense 373
☐ Contrib Acct Flag

☐ Employee Demo

☑ First Name ☐ Middle Name ☑ Last Name ☐ Generation

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

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

3. Verify retiree information.

Position Management > Maintenance > PMIS Position Modify > Budget

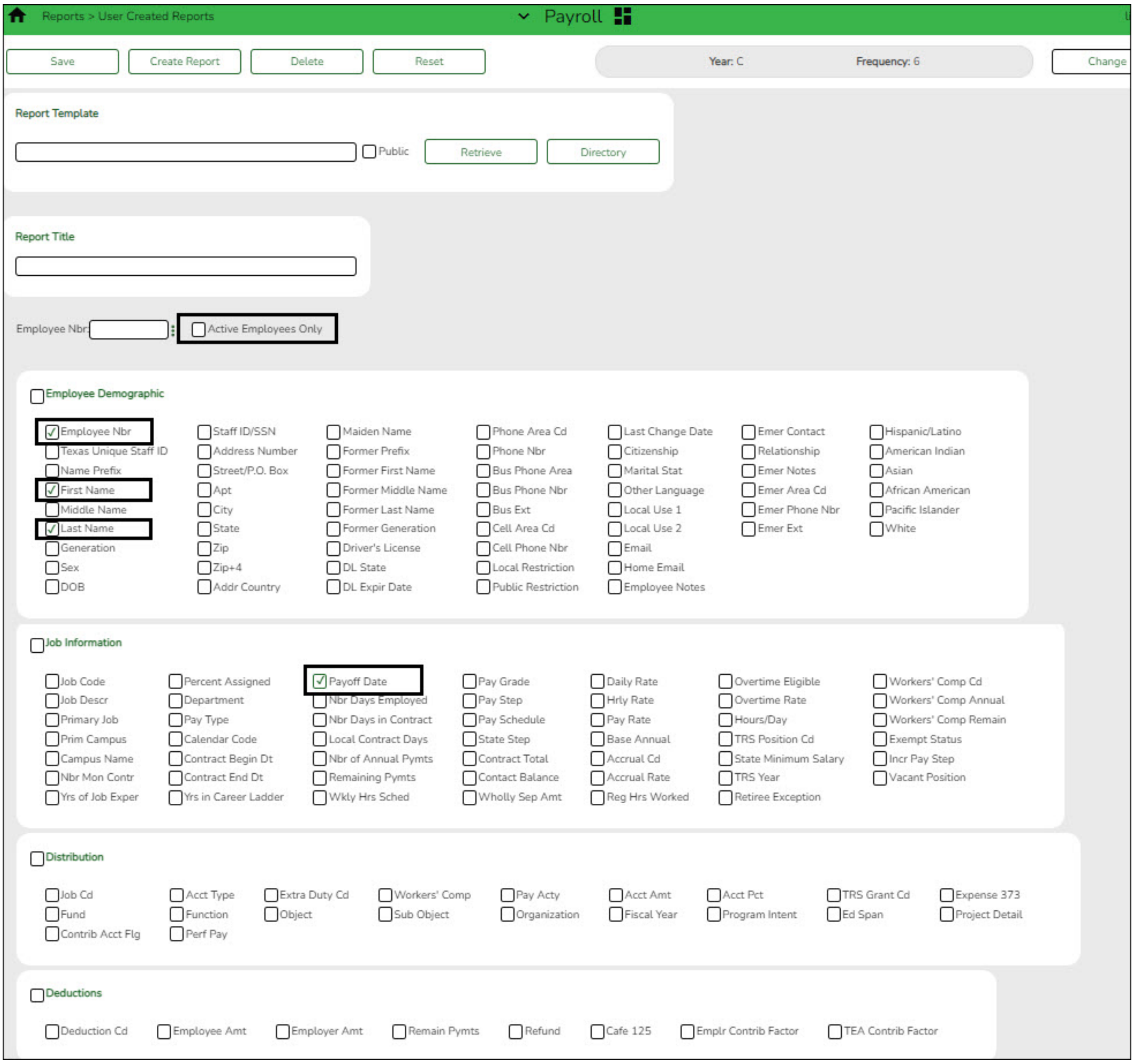
Verify that the **TRS Status** field is set to *5 - Retired* for retirees. If the TRS status is incorrect, there is a possibility that the status will be incorrect (TRS-eligible) when the employee is moved to the current year payroll.

4. Identify employees to be moved to current year payroll.

Log on to the current year.

Payroll > Reports > User Created Reports

Generate a user-created report to identify the employees who begin their new contract in July. It is possible that the employees are inactive in the current year, be sure that the **Active Employees Only** field is not selected.


Reports > User Created Reports
Payroll
Save
Create Report
Delete
Reset
Year: C
Frequency: 6
Change
Report Template
Public
Retrieve
Directory
Report Title
Employee Nbr
Employee Demographic
Job Information
Distribution
Deductions

☐ Active Employees Only

☑ Employee Nbr

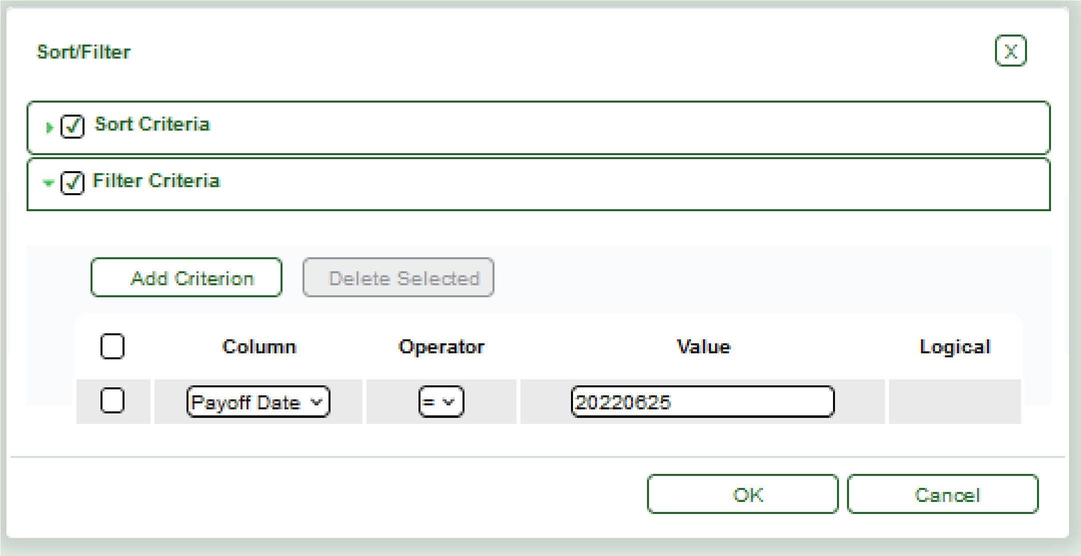
☑ First Name

☑ Last Name

☑ Payoff Date

☐ Prepare a list of new hires as a supplement to this list. Sort by the **Payoff Date** to verify that all employees who have a June payoff date have the same date. For example, it is possible that an employee has a payoff date that is a day before or after the actual June payoff date.

☐ Generate a user-created report again to verify that all of the data is accurate. Filter the report using your LEA's June payoff date (YYYYMMDD).


Sort/Filter
X
☑ Sort Criteria
☑ Filter Criteria
Add Criterion
Delete Selected
OK
Cancel

☐	Column	Operator	Value	Logical
☐	Payoff Date	=	20220625	

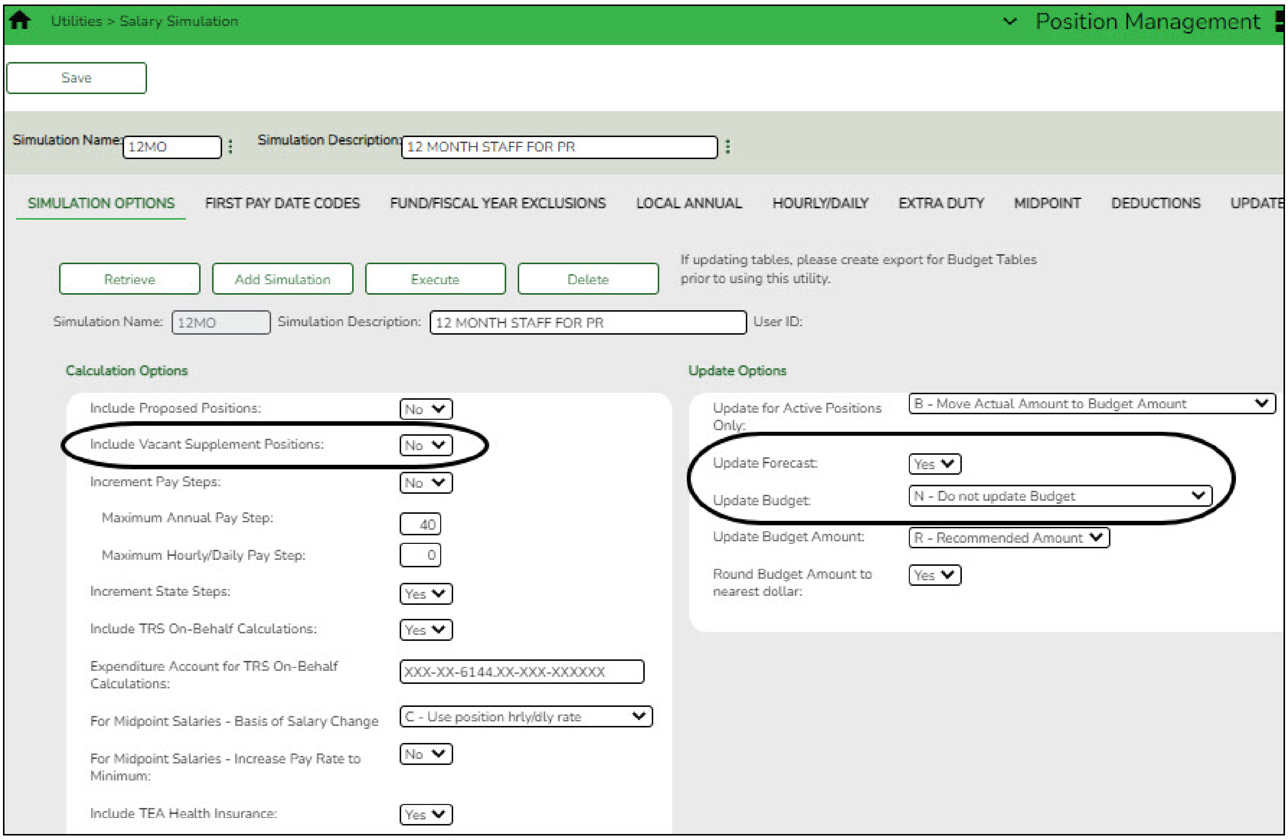
Print or save the report.

5. Create a salary simulation.

Log on to the next year.

Prior to setting up and performing salary simulations, review the Position Management: Salary Simulations Overview guide for a description of the Salary Simulation pages and samples of the available simulation reports.

Position Management > Utilities > Salary Simulation > Simulation Options


Utilities > Salary Simulation
Position Management
Save
SIMULATION OPTIONS
FIRST PAY DATE CODES
FUND/FISCAL YEAR EXCLUSIONS
LOCAL ANNUAL
HOURLY/DAILY
EXTRA DUTY
MIDPOINT
DEDUCTIONS
UPDATE
Retrieve
Add Simulation
Execute
Delete
Calculation Options
Update Options

Simulation Name: 12MO
Simulation Description: 12 MONTH STAFF FOR PR

If updating tables, please create export for Budget Tables prior to using this utility.

Simulation Name: 12MO
Simulation Description: 12 MONTH STAFF FOR PR
User ID:

Include Proposed Positions: No
Include Vacant Supplement Positions: No
Increment Pay Steps: No
Maximum Annual Pay Step: 40
Maximum Hourly/Daily Pay Step: 0
Increment State Steps: Yes
Include TRS On-Behalf Calculations: Yes
Expenditure Account for TRS On-Behalf Calculations: XXX-XX-6144.XX-XXX-XXXXXX
For Midpoint Salaries - Basis of Salary Change: C - Use position hrly/dly rate
For Midpoint Salaries - Increase Pay Rate to Minimum: No
Include TEA Health Insurance: Yes

Update for Active Positions Only: B - Move Actual Amount to Budget Amount
Update Forecast: Yes
Update Budget: N - Do not update Budget
Update Budget Amount: R - Recommended Amount
Round Budget Amount to nearest dollar: Yes

❑ Complete the following:

- (**Recommended**) In the **Include Vacant Supplement Positions** field, select *No*.
- In the **Update Forecast** field, select *No*.
- In the **Update Budget** field, select *N - Do Not Update Budget*.
- Include all first pay date codes for 12-month employees who receive their first paycheck in July. Include all local/annual, hourly/daily, midpoint (if applicable), and extra duty tables.
- If increases are not provided to 12-month employees in July, do not include an increase in the salary tables. If increases are provided to 12-month employees in July, update the salary tables with the increase data.
- If the LEA decides to interface the simulation to Budget, add the deductions with the annual amount for the Employer Contribution.

❑ Click **Save**.

❑ Click **Execute**. Review the Simulation Process Error Listing and correct any errors prior to continuing the process.

- Generate the simulation reports and review all salaries.
- Review the user-created report to confirm that all 12-month employees or positions are included in the simulation. The reflected salaries are the amounts that are used to pay employees in the current year payroll.

If necessary, continue making corrections and running the simulation until all of the salary amounts are correct.

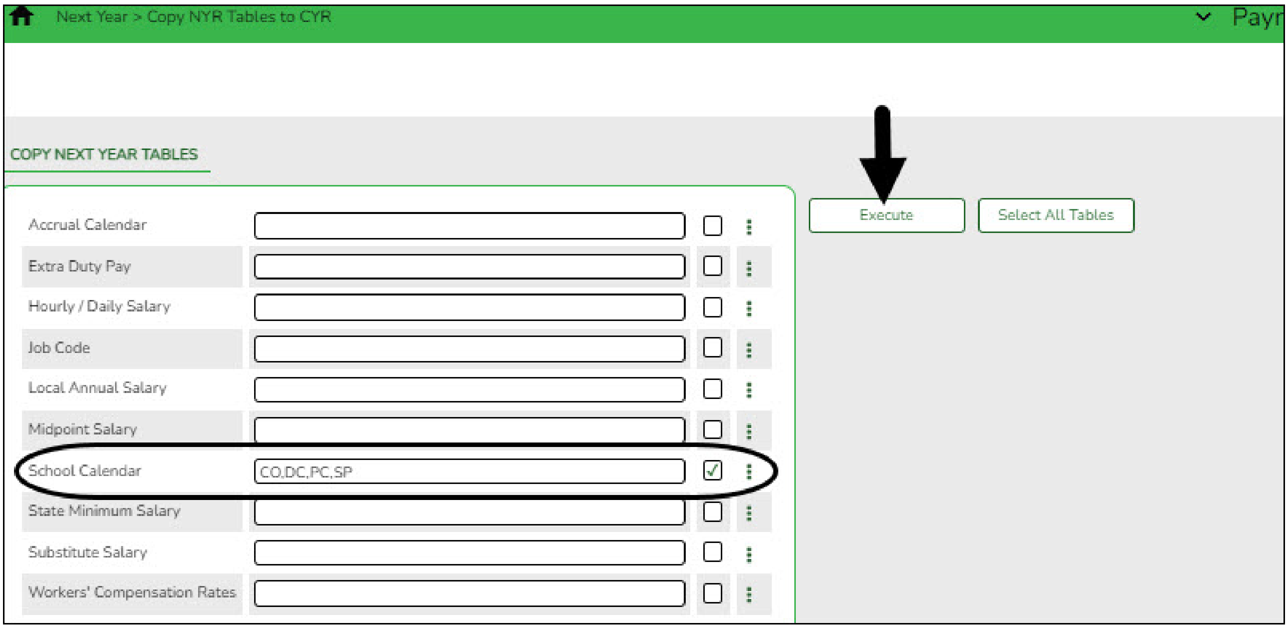
☐ Run the final simulation. This process updates the included state step, pay step, and salary amount in the next year PMIS for all 12-month positions and clears the **Accept Changes** field.

- In the **Update Forecast** field, select *Yes*.
- Click **Save**.
- Generate and save the reports.
- Click **Process** to process the simulation. Create a backup.

6. Copy school calendars from next year to current year payroll.

Log on to the next year.

Payroll > Next Year > Copy Next Year Tables



Accrual Calendar ☐
Extra Duty Pay ☐
Hourly / Daily Salary ☐
Job Code ☐
Local Annual Salary ☐
Midpoint Salary ☐
School Calendar CO,DC,PC,SP ☑
State Minimum Salary ☐
Substitute Salary ☐
Workers' Compensation Rates ☐

☐ In the **School Calendar** field, select only the 12-month employee calendars.

> **TIP**: The calendar code is displayed in the first pay date code on the simulation (e.g., J40 includes calendar code 40).

☐ Click **Execute**.

> **Note**: If changes were made to the next year payroll tables (extra duty pay, hourly/daily salary, job code, local annual salary, etc.), copy the tables from the next year payroll to the current year payroll.

7. Generate a user-created report.

Log on to the current year.

Payroll > Reports > User Created Reports

Generate a user-created report with the **Hrs Per Day** field selected. This field is overwritten when positions are moved from the next year to the current year.

8. Move forecast to current year position and payroll

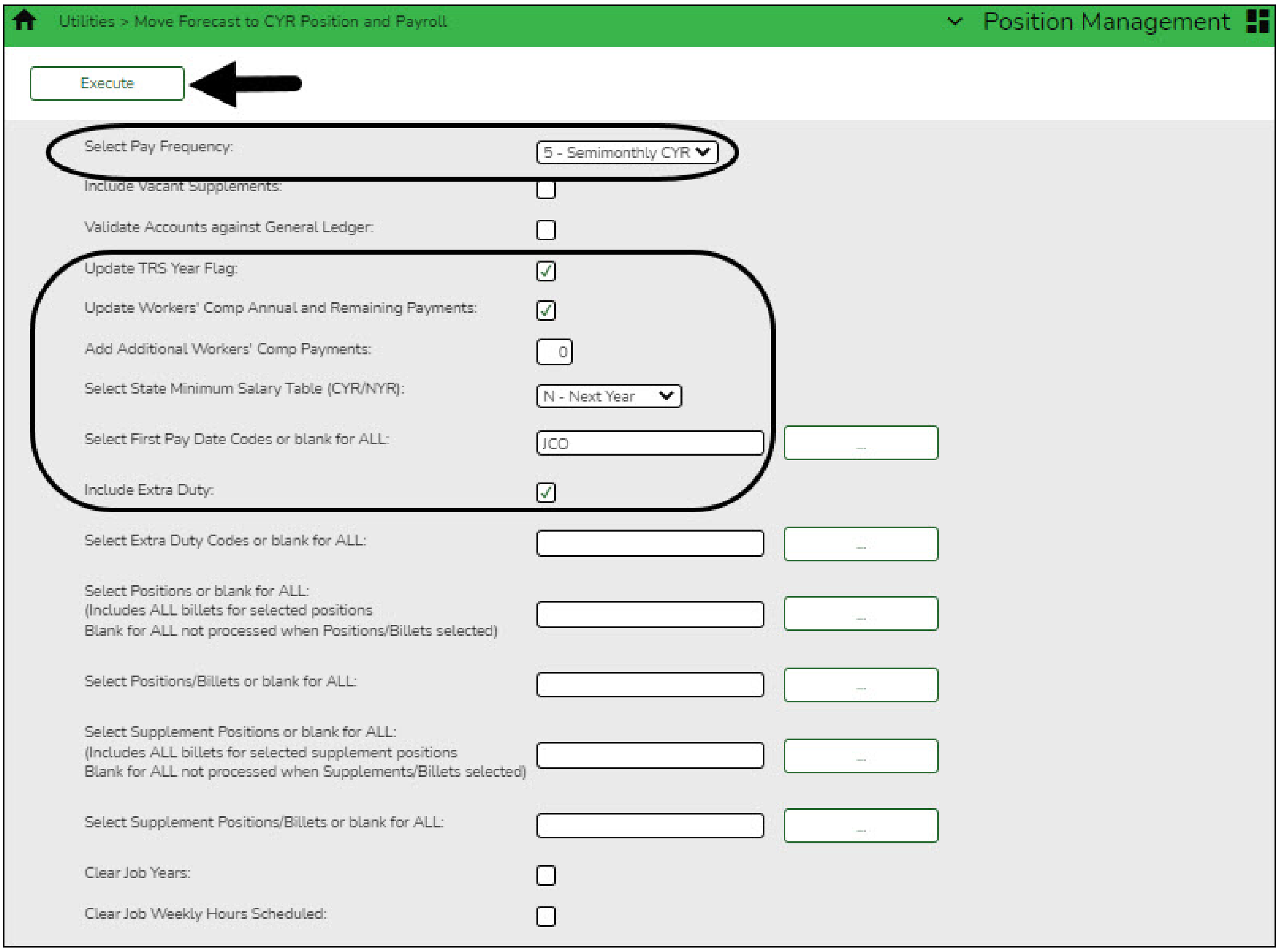
Log on to the next year.

Position Management > Utilities > Move Forecast to CYR Position and Payroll

This process is used to move payroll and position forecast records to the current year PMIS with the same information that is set up in the next year PMIS records.

It also updates fields on the following Maintenance tabs: Employment Info, Pay Info, Job Info, Distribution

The **Accept Changes** field must be cleared when moving position records from forecast to current; otherwise, position records cannot be moved. The **Accept Changes** field is cleared after running a simulation with the **Update Forecast** field set to *Yes*. Similarly, you cannot run a simulation for positions without the **Accept Changes** field selected.



Select Pay Frequency: 5 - Semimonthly CYR

Include Vacant Supplements: ☐

Validate Accounts against General Ledger: ☐

Update TRS Year Flag: ☑

Update Workers' Comp Annual and Remaining Payments: ☑

Add Additional Workers' Comp Payments: 0

Select State Minimum Salary Table (CYR/NYR): N - Next Year

Select First Pay Date Codes or blank for ALL: JCO

Include Extra Duty: ☑

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:

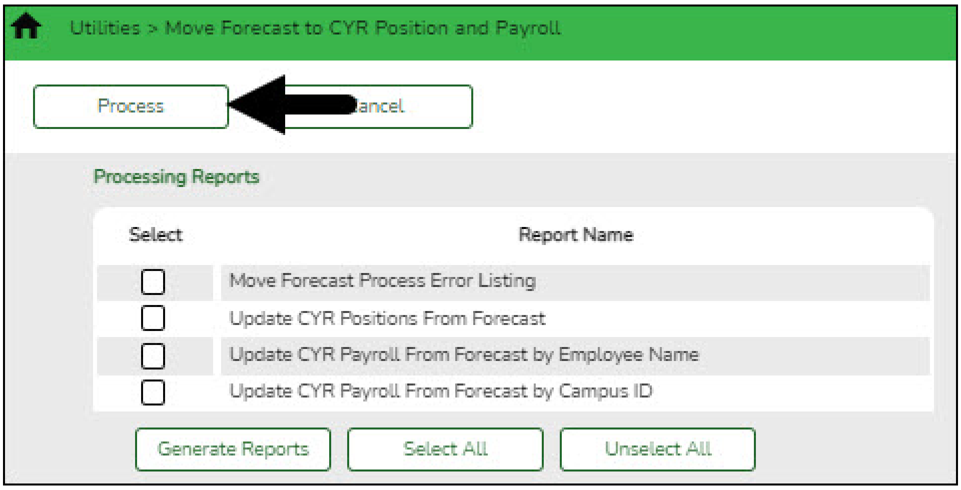
Clear Job Years: ☐

Clear Job Weekly Hours Scheduled: ☐

Select Pay Frequency	Click ⌄ to select the pay frequency where you want to move to the current year. This is a required field.
Include Vacant Supplements	Select to include the vacant supplement positions. **Recommendation**: Do not select this field unless it is your final move.
Validate Accounts against General Ledger	This field is selected by default. Clear this field to not validate the accounts against the general ledger. **Recommendation**: Select this field if you are doing your first test move. By doing so, the appropriate errors are generated to inform you of incorrect account codes in PMIS. If not selected, those account codes are moved to Payroll if each account component is valid.
Update TRS Year Flag	Select to update the **TRS Year** field on the Payroll > Staff/Job Pay Data > Job Info tab. **Recommendation**: Select this field if the employees being moved will receive a contract payment prior to the first pay date of the new school year (i.e., July and August starts).
Update Workers' Comp Annual and Remaining Payments	Select to update the **WC Ann Pymts** and **WC Remain** fields on the Payroll > Staff/Job Pay Data > Job Info tab. The **WC Ann Pymts** field indicates the number of annual workers' compensation payments for the contract period and the **WC Remain** field indicates the number of remaining workers' compensation payments to be made during the contract period.
Add Additional Workers' Comp Payments	Type the number of additional workers' compensation payments. The field accepts any value between 0-9. This field is helpful as it can be difficult to identify which months have a third payroll for the biweekly frequency. You can use this field to add one or two to the contract months times two.
Select State Minimum Salary Table (CYR/NYR)	Click ⋮ to select the current year or next year. This is a required field. This selection determines which salary table is referenced when calculating the state foundation salary.
Select First Pay Date Codes or blank for ALL	Select the first pay date codes that begin their new contract payout. Type the pay date codes, separating multiple pay date codes with a comma but no space (e.g., 1,17,88,A1). Or, click ⋮ to search for pay date codes. Otherwise, leave blank to use all pay date codes.
Include Extra Duty	Select to include extra duty in the process. If not selected, no extra duty will be processed even if extra duty codes are selected.

Select Extra Duty Codes or blank for ALL	Select all of the supplements as only those supplements that are tied to an employee being moved based on the first pay date code will be selected. You can select a supplement even if it is tied to an employee who you do not want to pay yet. Type the extra duty codes, separating multiple extra duty codes with a comma but no space (e.g., 08,20,A2,TF). Or, click ⋮ to search for extra duty codes. Otherwise, leave blank to use all extra duty codes.
Select Positions or blank for ALL (Includes ALL billets for selected positions Blank for ALL not processed when Positions/Billets selected)	Type the position codes, separating multiple position codes with a comma but no space (e.g., PRIN,T187). Or, click ⋮ to search for position codes. Otherwise, leave blank to use all position codes.
Select Positions/Billets or blank for ALL	Type the position/billet codes, separating multiple position/billet codes with a comma but no space (e.g., PRIN/00001,PRIN/00006). Or, click ⋮ to search for position/billet codes. Otherwise, leave blank to use all position/billet codes.
Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions Blank for ALL not processed when Supplements/Billets selected)	Type the supplement position codes, separating multiple supplement position codes with a comma but no space (e.g., PRIN,T187). Or, click ⋮ to search for supplement position codes. Otherwise, leave blank to use all supplement position codes.
Select Supplement Positions/Billets or blank for ALL	Type the supplement position/billet codes, separating multiple supplement position/billet codes with a comma but no space (e.g., PRIN/00001,PRIN/00006). Or, click ⋮ to search for supplement position/billet codes. Otherwise, leave blank to use all supplement position/billet codes.
Clear Job Years	Select to reset the job years to the default value (blank) on the employee's job record. If not selected and the employee's forecast position job code is the same as the current year job master record, then the new job record is populated with the values from the current year job master record.
Clear Job Weekly Hours Scheduled	Select to reset the weekly hours scheduled to the default value (blank) on the employee's job record. If not selected and the employee's forecast position job code is the same as the current year job master record, then the new job record is populated with the values from the current year job master record.

☐ Click **Execute** to execute the process. The following reports are available:

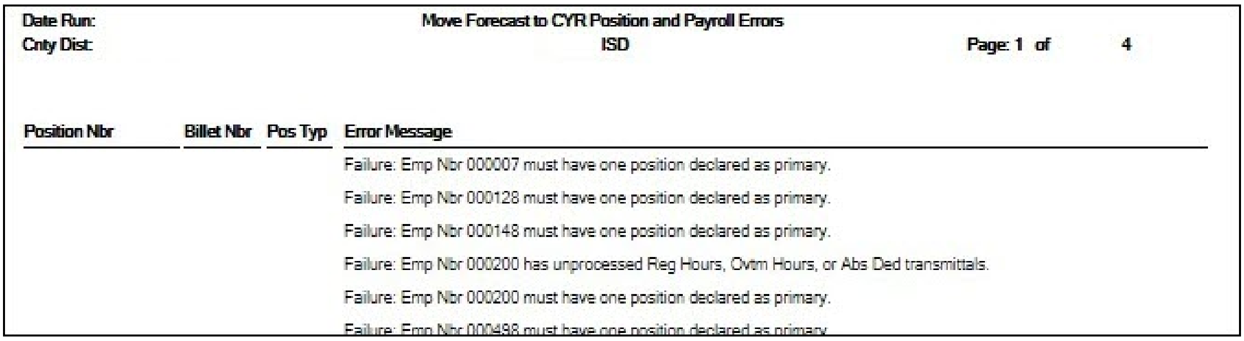

Utilities > Move Forecast to CYR Position and Payroll
Process
Cancel
Processing Reports
Select
Report Name
Generate Reports
Select All
Unselect All

Select	Report Name
☐	Move Forecast Process Error Listing
☐	Update CYR Positions From Forecast
☐	Update CYR Payroll From Forecast by Employee Name
☐	Update CYR Payroll From Forecast by Campus ID

- Move Forecast Process Error Listing Important errors

Error Message	Description
Warning: The employee has Contract Balance amounts not equal to zero for current jobs.	The employee has not been paid off by payroll.
Failure: Position Accept Changes Flag set to Y	The position will not be moved to the current/payroll.
Failure: Emp Nbr must have one position declared as primary.	The error does not necessarily reference the **Primary Job** field on the position. If an employee has a regular position and a supplement position, but there is an error that causes the primary position to fail, this message often indicates that there is only a supplement position to be moved. It is recommended to review and correct any errors that begin below this message about primary positions. After making those corrections, run the process again. This may resolve the primary job errors. This error also occurs when calendars have not been copied to the current year.

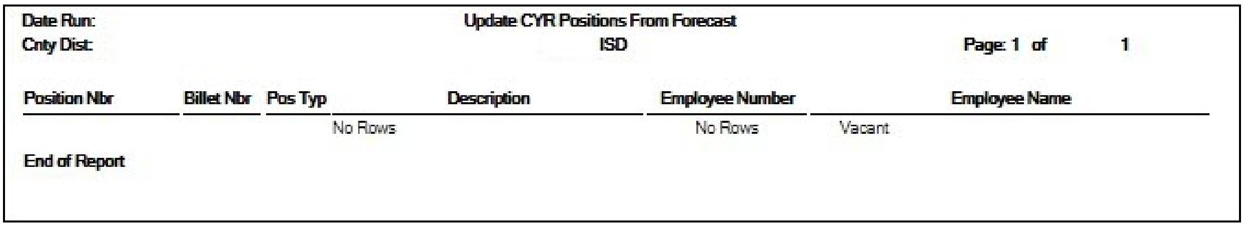
Error Message	Description
Warning: Emp Nbr has multiple supplement positions for the same job; however, one or more of the following do not match: Campus ID, Dept, TRS Status Code, FTE Units, Incr Elig, Max Paymts, FICA Elig, Unemp Elig, EEOC, Workers Comp, Supplement Extra Days or Category Cd. The values from lowest Supplement Position Number/Billet may be used if new rows are inserted for the Pay Info and Job Info tabs.	This error indicates that the fields on the Payroll > Tables > Salaries > Extra Duty tab do not match those selected on a supplemental position. Use the Position Management > Inquiry > PMIS Staff Inquiry to determine the Position Number and Billet for any supplemental positions for the employee. Then, use the Position Management > Maintenance > PMIS Supplement Modify page to retrieve the position and billet and compare the fields on the position to the Payroll > Tables > Salary > Extra Duty tab for the extra duty number on the supplement. For example, in some cases the W/C code on the position may not match the W/C code on the table. Or, the **Exp 373** field on the position may be selected, but the **Exp 373** on the table for that extra duty code may not be selected. Either the table or the position needs to be updated so that they both match. If changes are made to the Extra Duty table, it is necessary to move the table to the current year payroll before proceeding.



```
Date Run:                     Move Forecast to CYR Position and Payroll Errors
Cnty Dist:                                   ISD                              Page: 1  of     4


Position Nbr    Billet Nbr  Pos Typ  Error Message
                                     Failure: Emp Nbr 000007 must have one position declared as primary.
                                     Failure: Emp Nbr 000128 must have one position declared as primary.
                                     Failure: Emp Nbr 000148 must have one position declared as primary.
                                     Failure: Emp Nbr 000200 has unprocessed Reg Hours, Ovtm Hours, or Abs Ded transmittals.
                                     Failure: Emp Nbr 000200 must have one position declared as primary.
                                     Failure: Emp Nbr 000498 must have one position declared as primary.
```

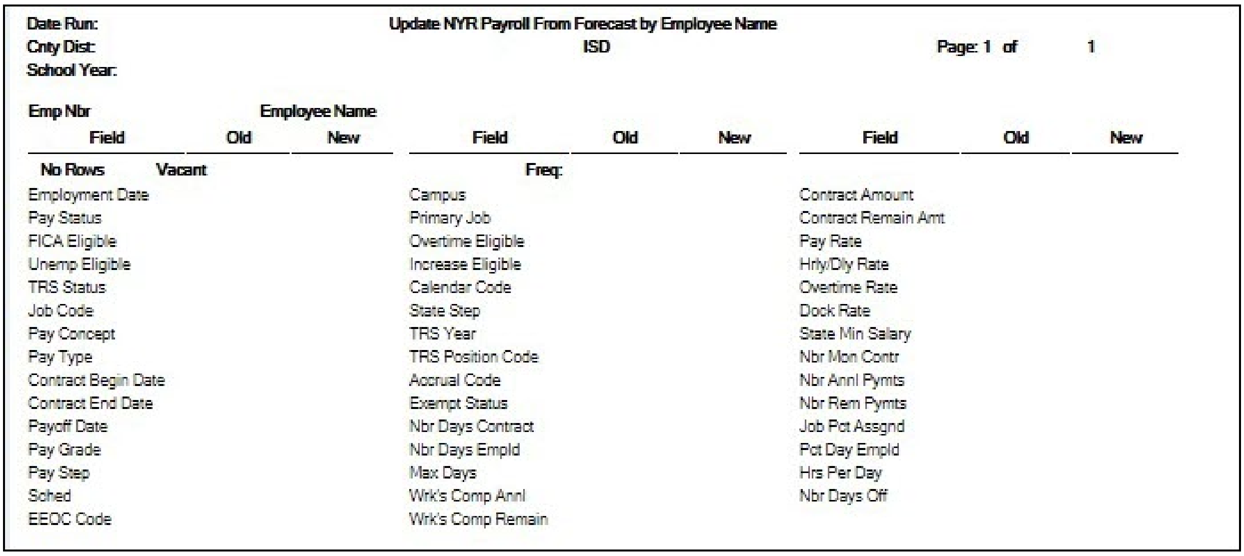
- Update CYR Positions From Forecast - The error report lists any funds that need to be set up in the Finance tables.



```
Date Run:                          Update CYR Positions From Forecast
Cnty Dist:                                    ISD                              Page: 1  of     1

Position Nbr    Billet Nbr  Pos Typ        Description         Employee Number        Employee Name
                                  No Rows                          No Rows       Vacant
End of Report
```

- Update CYR Payroll From Forecast by Employee Name



Date Run:
Cnty Dist:
School Year:

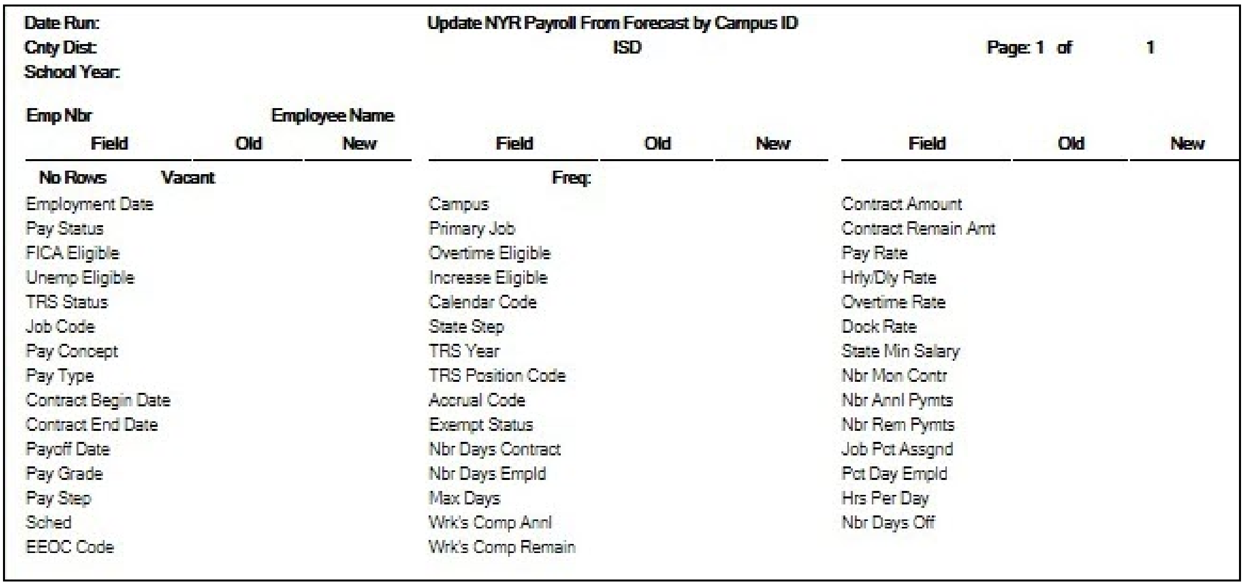
Update NYR Payroll From Forecast by Employee Name
ISD

Page: 1 of 1

Emp Nbr **Employee Name**

Field	Old	New	Field	Old	New	Field	Old	New
No Rows Vacant			**Freq:**					
Employment Date			Campus			Contract Amount		
Pay Status			Primary Job			Contract Remain Amt		
FICA Eligible			Overtime Eligible			Pay Rate		
Unemp Eligible			Increase Eligible			Hrly/Dly Rate		
TRS Status			Calendar Code			Overtime Rate		
Job Code			State Step			Dock Rate		
Pay Concept			TRS Year			State Min Salary		
Pay Type			TRS Position Code			Nbr Mon Contr		
Contract Begin Date			Accrual Code			Nbr Annl Pymts		
Contract End Date			Exempt Status			Nbr Rem Pymts		
Payoff Date			Nbr Days Contract			Job Pct Assgnd		
Pay Grade			Nbr Days Empld			Pct Day Empld		
Pay Step			Max Days			Hrs Per Day		
Sched			Wrk's Comp Annl			Nbr Days Off		
EEOC Code			Wrk's Comp Remain					

- ○ Update CYR Payroll From Forecast by Campus ID



Date Run:
Cnty Dist:
School Year:

Update NYR Payroll From Forecast by Campus ID
ISD

Page: 1 of 1

Emp Nbr **Employee Name**

Field	Old	New	Field	Old	New	Field	Old	New
No Rows Vacant			**Freq:**					
Employment Date			Campus			Contract Amount		
Pay Status			Primary Job			Contract Remain Amt		
FICA Eligible			Overtime Eligible			Pay Rate		
Unemp Eligible			Increase Eligible			Hrly/Dly Rate		
TRS Status			Calendar Code			Overtime Rate		
Job Code			State Step			Dock Rate		
Pay Concept			TRS Year			State Min Salary		
Pay Type			TRS Position Code			Nbr Mon Contr		
Contract Begin Date			Accrual Code			Nbr Annl Pymts		
Contract End Date			Exempt Status			Nbr Rem Pymts		
Payoff Date			Nbr Days Contract			Job Pct Assgnd		
Pay Grade			Nbr Days Empld			Pct Day Empld		
Pay Step			Max Days			Hrs Per Day		
Sched			Wrk's Comp Annl			Nbr Days Off		
EEOC Code			Wrk's Comp Remain					

☐ Click **Generate Reports**. The selected reports are displayed. Review the report.

☐ Click **Continue** to view the next report. Or, click **Return** to return to the report selection page.

☐ After reviewing all of the reports and correcting all errors, return to the report selection page and click **Process** to move the forecast records to the current year. You are prompted to create a backup.

After the process is completed, the actual update is performed. If the update is successful, a message is displayed indicating that the move forecast updates were processed successfully.

Reminder: If fund/fiscal year(s) were added to Finance based on the error report listing, they should be deleted at this point.

❏ Click **Cancel** to return to the Move Forecast to CYR Position and Payroll page without moving the forecast records to the current year.

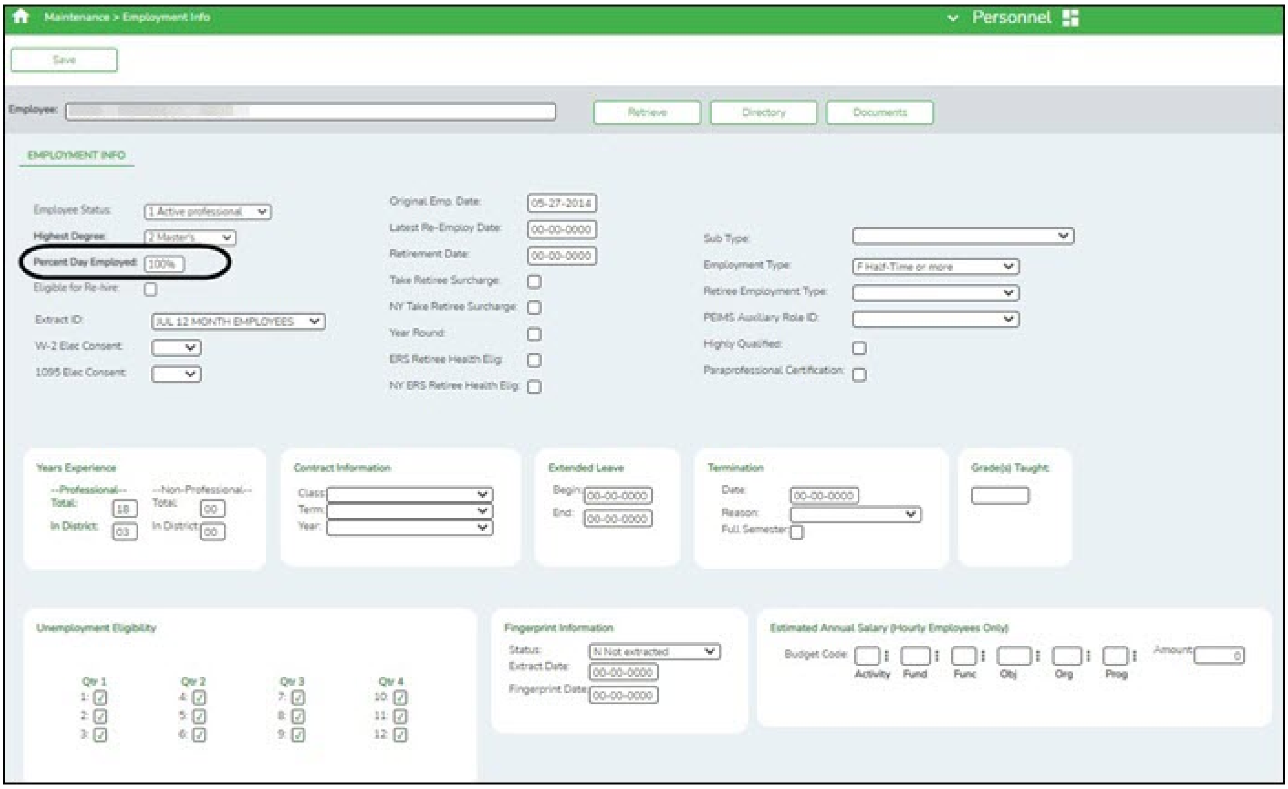
If corrections are processed, repeat this step.

Generate and save each report. Compare the Update CYR Positions From Forecast report to the user-created report that was previously generated to confirm that all 12-month employees are included. The last two reports contain the same information; one is sorted by employee name and the other by campus ID. These reports reflect the existing salary in the current year payroll and the new salary, which overwrites the current year payroll amounts. Review the reports for accuracy.

9. Confirm that CYR salaries are accurate.

Log on to the current year.

Verify the current year data to confirm that the salaries are correct. The following fields are updated:


Maintenance > Employment Info
Personnel
Save
Retrieve
Directory
Documents
EMPLOYMENT INFO
Years Experience
Contract Information
Extended Leave
Termination
Grade(s) Taught:
Unemployment Eligibility
Fingerprint Information
Estimated Annual Salary (Hourly Employees Only)

Employee: [redacted]

Employee Status: 1 Active professional

Highest Degree: 2 Master's

Percent Day Employed: 100%

Eligible for Re-hire: ☐

Extract ID: JUL 12 MONTH EMPLOYEES

W-2 Elec Consent:

1095 Elec Consent:

Original Emp. Date: 05-27-2014

Latest Re-Employ Date: 00-00-0000

Retirement Date: 00-00-0000

Take Retiree Surcharge: ☐

NY Take Retiree Surcharge: ☐

Year Round: ☐

ERS Retiree Health Elig: ☐

NY ERS Retiree Health Elig: ☐

Sub Type:

Employment Type: F Half-Time or more

Retiree Employment Type:

PEIMS Auxiliary Role ID:

Highly Qualified: ☐

Paraprofessional Certification: ☐

Years Experience: --Professional-- Total: 18 In District: 03 --Non-Professional-- Total: 00 In District: 00

Contract Information: Class: Term: Year:

Extended Leave: Begin: 00-00-0000 End: 00-00-0000

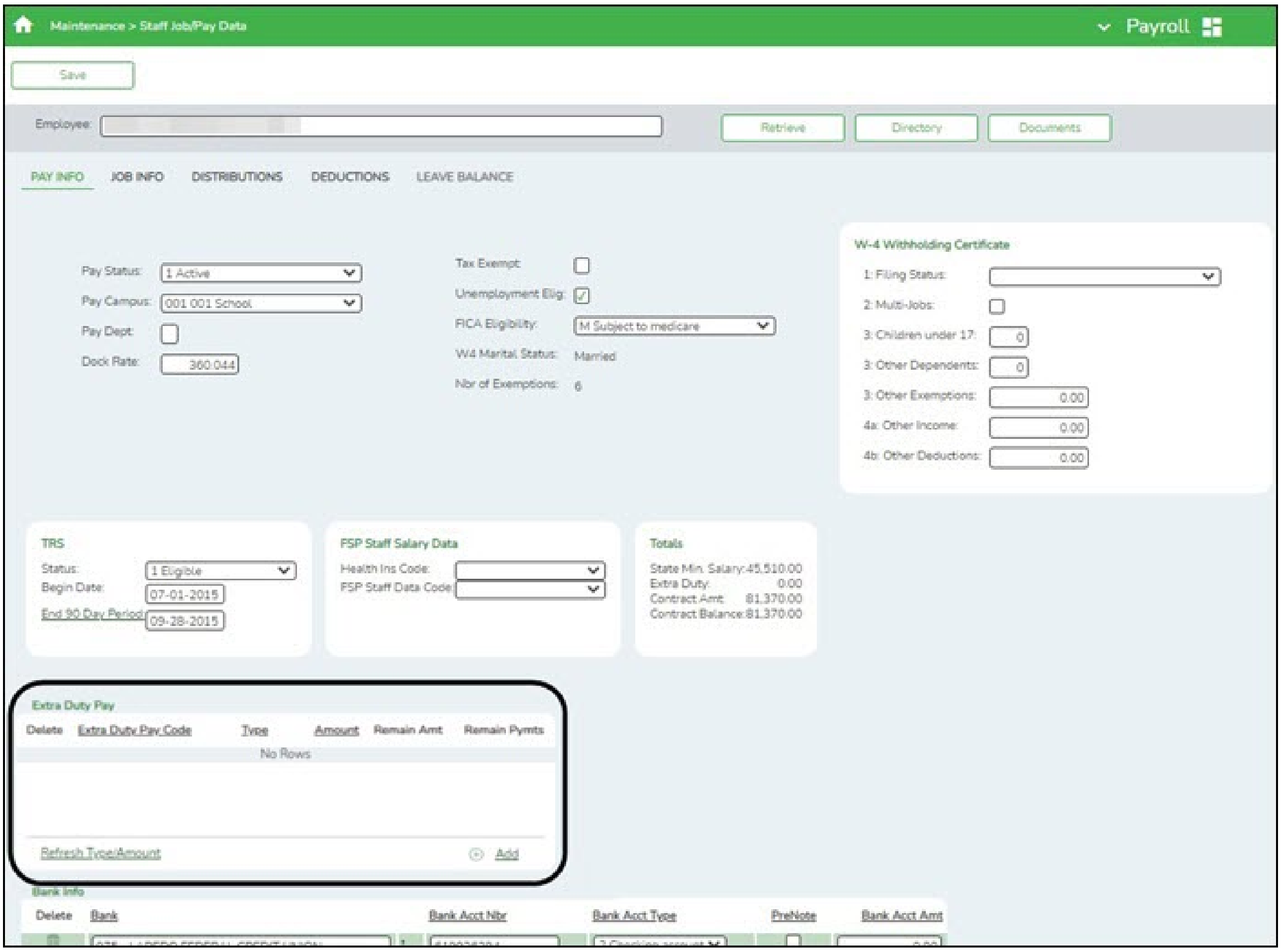
Termination: Date: 00-00-0000 Reason: Full Semester: ☐

Grade(s) Taught:

Unemployment Eligibility: Qtr 1: 1: ☑ 2: ☑ 3: ☑ Qtr 2: 4: ☑ 5: ☑ 6: ☑ Qtr 3: 7: ☑ 8: ☑ 9: ☑ Qtr 4: 10: ☑ 11: ☑ 12: ☑

Fingerprint Information: Status: N Not extracted Extract Date: 00-00-0000 Fingerprint Date: 00-00-0000

Budget Code: Activity Fund Func Obj Org Prog Amount: 0



Maintenance > Staff Job/Pay Data
Payroll
Save
Retrieve
Directory
Documents
PAY INFO
JOB INFO
DISTRIBUTIONS
DEDUCTIONS
LEAVE BALANCE

Employee: [redacted]

Pay Status: 1 Active
Pay Campus: 001 001 School
Pay Dept: ☐
Dock Rate: 360.044

Tax Exempt: ☐
Unemployment Elig: ☑
FICA Eligibility: M Subject to medicare
W4 Marital Status: Married
Nbr of Exemptions: 6

W-4 Withholding Certificate
1: Filing Status:
2: Multi-Jobs: ☐
3: Children under 17: 0
3: Other Dependents: 0
3: Other Exemptions: 0.00
4a: Other Income: 0.00
4b: Other Deductions: 0.00

TRS
Status: 1 Eligible
Begin Date: 07-01-2015
End 90 Day Period: 09-28-2015

FSP Staff Salary Data
Health Ins Code:
FSP Staff Data Code:

Totals
State Min. Salary: 45,510.00
Extra Duty: 0.00
Contract Amt: 81,370.00
Contract Balance: 81,370.00

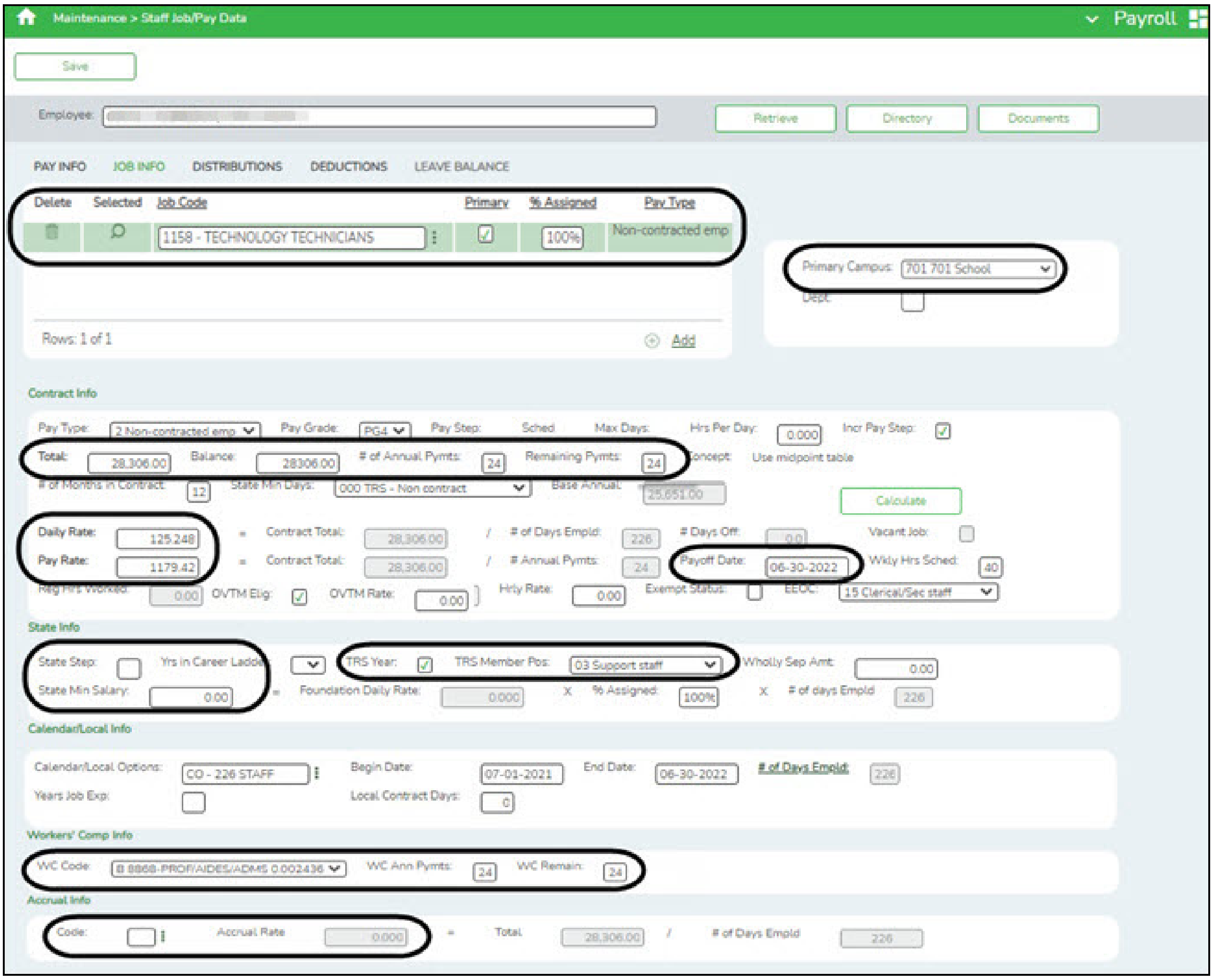
Extra Duty Pay

Delete	Extra Duty Pay Code	Type	Amount	Remain Amt	Remain Pymts
No Rows					

Refresh Type/Amount
Add

Bank Info

Delete
Bank
Bank Acct Nbr
Bank Acct Type
PreNote
Bank Acct Amt


Maintenance > Staff Job/Pay Data
Payroll
Save
Retrieve
Directory
Documents
PAY INFO
JOB INFO
DISTRIBUTIONS
DEDUCTIONS
LEAVE BALANCE
Calculate
Add

Employee: [redacted]

Delete	Selected	Job Code	Primary	% Assigned	Pay Type
		1158 - TECHNOLOGY TECHNICIANS	☑	100%	Non-contracted emp

Rows: 1 of 1

Primary Campus: 701 701 School
Dept: ☐

Contract Info

Pay Type: 2 Non-contracted emp
Pay Grade: PG4
Pay Step:
Sched
Max Days:
Hrs Per Day: 0.000
Incr Pay Step: ☑
Total: 28,306.00
Balance: 28306.00
# of Annual Pymts: 24
Remaining Pymts: 24
Concept: Use midpoint table
# of Months in Contract: 12
State Min Days: 000 TRS - Non contract
Base Annual: 25,651.00
Daily Rate: 125.248 = Contract Total: 28,306.00 / # of Days Empld: 226
Days Off: 0.0
Vacant Job: ☐
Pay Rate: 1179.42 = Contract Total: 28,306.00 / # Annual Pymts: 24
Payoff Date: 06-30-2022
Wkly Hrs Sched: 40
Reg Hrs Worked: 0.00
OVTM Elig: ☑
OVTM Rate: 0.00
Hrly Rate: 0.00
Exempt Status: ☐
EEOC: 15 Clerical/Sec staff

State Info

State Step: ☐
Yrs in Career Ladde
TRS Year: ☑
TRS Member Pos: 03 Support staff
Wholly Sep Amt: 0.00
State Min Salary: 0.00 = Foundation Daily Rate: 0.000 X % Assigned: 100% X # of days Empld: 226

Calendar/Local Info

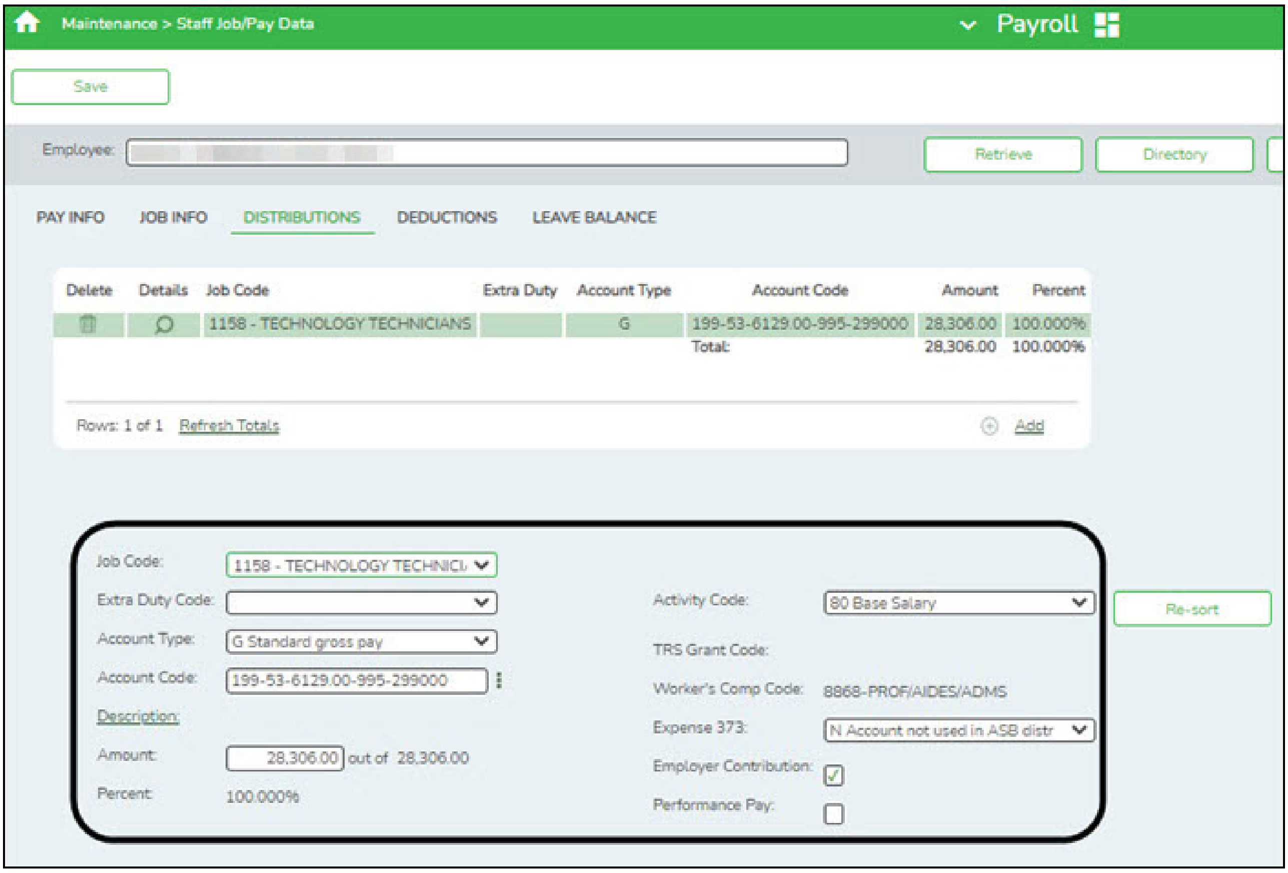
Calendar/Local Options: CO - 226 STAFF
Begin Date: 07-01-2021
End Date: 06-30-2022
# of Days Empld: 226
Years Job Exp: ☐
Local Contract Days: 0

Workers' Comp Info

WC Code: B 8868-PROF/AIDES/ADMS 0.002436
WC Ann Pymts: 24
WC Remain: 24

Accrual Info

Code: ☐
Accrual Rate 0.000 = Total 28,306.00 / # of Days Empld 226


Maintenance > Staff Job/Pay Data
Payroll
Save
Retrieve
Directory
PAY INFO
JOB INFO
DISTRIBUTIONS
DEDUCTIONS
LEAVE BALANCE
Add
Re-sort

Employee: [redacted]

Delete	Details	Job Code	Extra Duty	Account Type	Account Code	Amount	Percent
		1158 - TECHNOLOGY TECHNICIANS		G	199-53-6129.00-995-299000	28,306.00	100.000%
					Total:	28,306.00	100.000%

Rows: 1 of 1 Refresh Totals

Job Code: 1158 - TECHNOLOGY TECHNICI
Extra Duty Code:
Account Type: G Standard gross pay
Account Code: 199-53-6129.00-995-299000
Description:
Amount: 28,306.00 out of 28,306.00
Percent: 100.000%

Activity Code: 80 Base Salary
TRS Grant Code:
Worker's Comp Code: 8868-PROF/AIDES/ADMS
Expense 373: N Account not used in ASB distr
Employer Contribution: ☑
Performance Pay: ☐

10. Mass update fiscal year.

    Log on to the current year.

    Payroll > Utilities > Mass Update > Employee

    Skip this step if your LEA has a 7/1 fiscal year.

    Mass update the fiscal year to the current school year for all employees.

    Select **Fiscal Year** and type the current year fiscal year. Before processing, stop to consider if the LEA uses other fiscal years in the account codes for employees. If the entered year is not the only used fiscal year, additional parameters may need to be selected.

    Contact your regional ESC consultant if you need assistance.

    Identify those employees with a June payoff date and mass update the **Hrs Per Day** field.

    - For LEAs that use the hours per day functionality in the current year payroll, select the **Hrs Per Day** field and type the number of hours per day for the majority of employees.
    - Use the parameters to select specific groups of employees for the update.

1.

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