

Revised October 2014

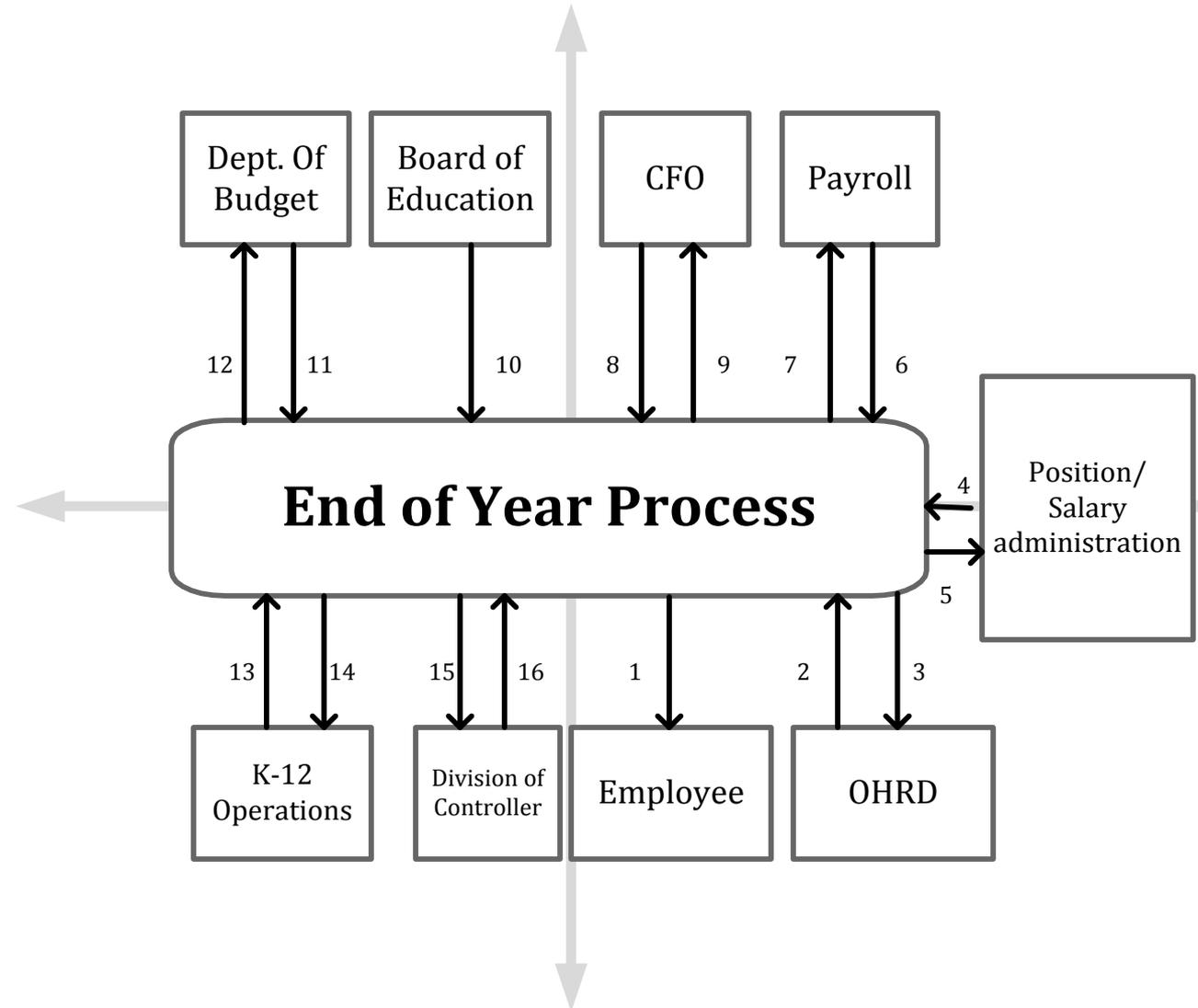
Position and Salary Administration End of Year Process

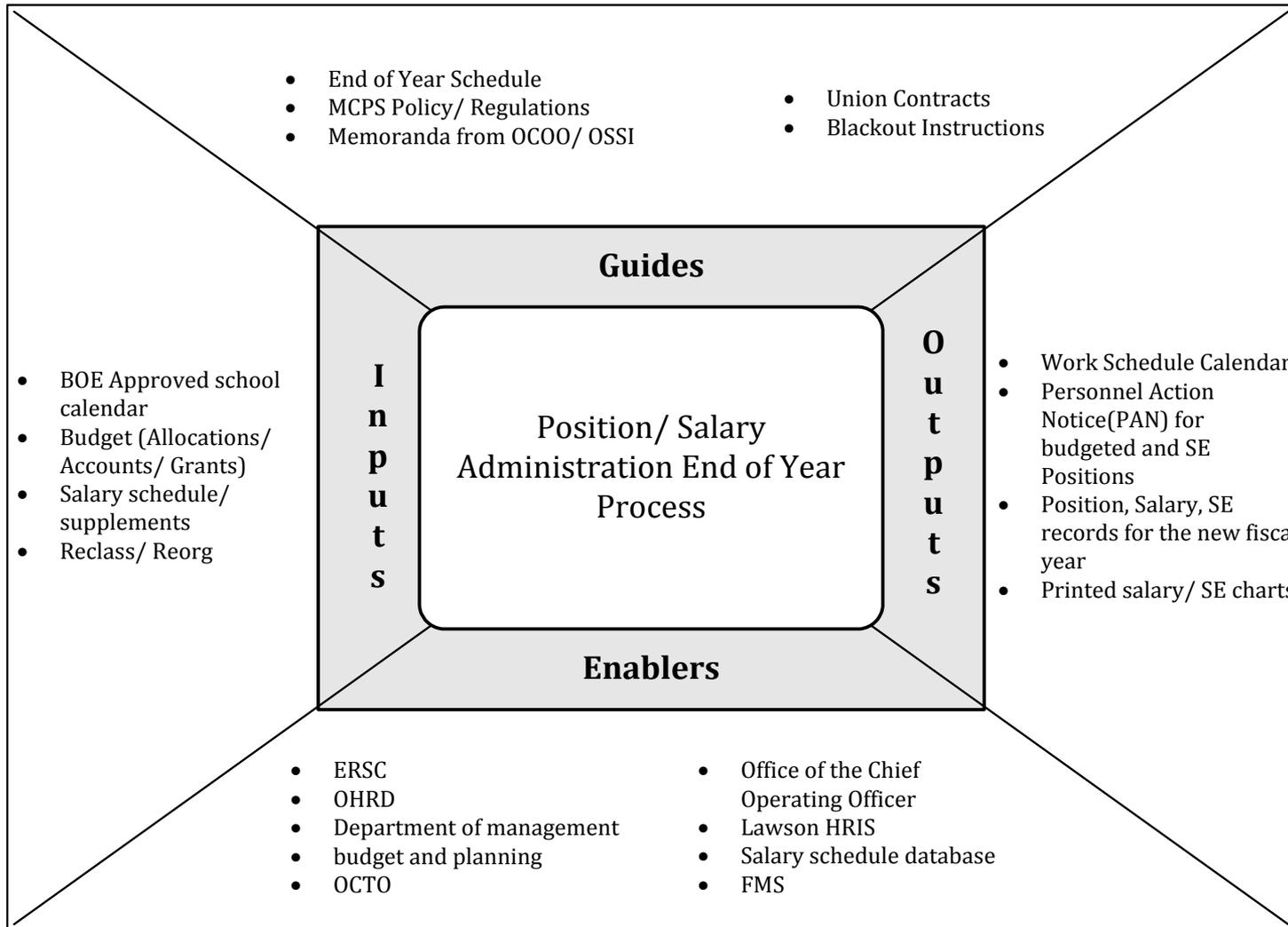
Employee and Retiree Service Center

Position and Salary Administration -End of Year Process

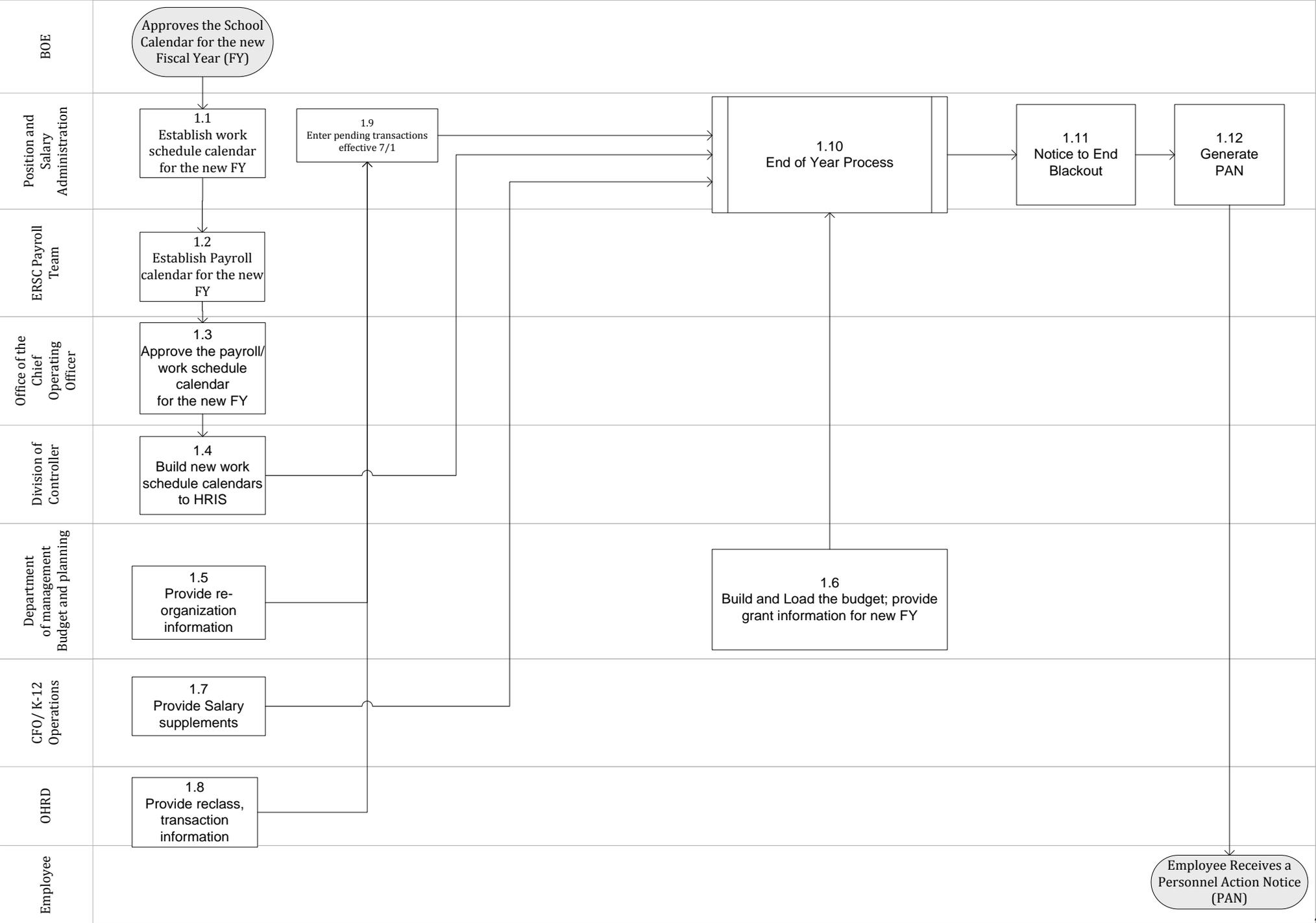
Stakeholder Analysis

- 1 Employee receives a Personnel Action Notice (PAN)
- 2 OHRD Provides transactions/ notification of reclassifications
- 3 OHRD receives notification of blackout timelines; transaction instructions; notice of completion
- 4 Position/ Salary position administration does the system setup and runs the end of year process
- 5 Successful completion of End of Year Process.
- 6 Builds the payroll calendar for the new fiscal year. Successful completion of payroll for the last full pay period of the previous fiscal year
- 7 Successful completion of split payroll for the new fiscal year.
- 8 CFO provides the list of employees receiving certain supplements to salary and position administration
- 9 CFO receives notification of the supplement processing
- 10 Board of Education approves the calendar for the new fiscal year
- 11 Department of budget sets up new fiscal year budget in Lawson HRIS; Provides the grant information for the new fiscal year
- 12 Receives the notification of timelines, blackout and successful completion
- 13 Provides information of several supplements
- 14 Receives the notification of timelines, blackout and successful completion
- 15 Division of Controller Receives the approved payroll calendar
- 16 Division of Controller builds the approved work schedule calendar in HRIS

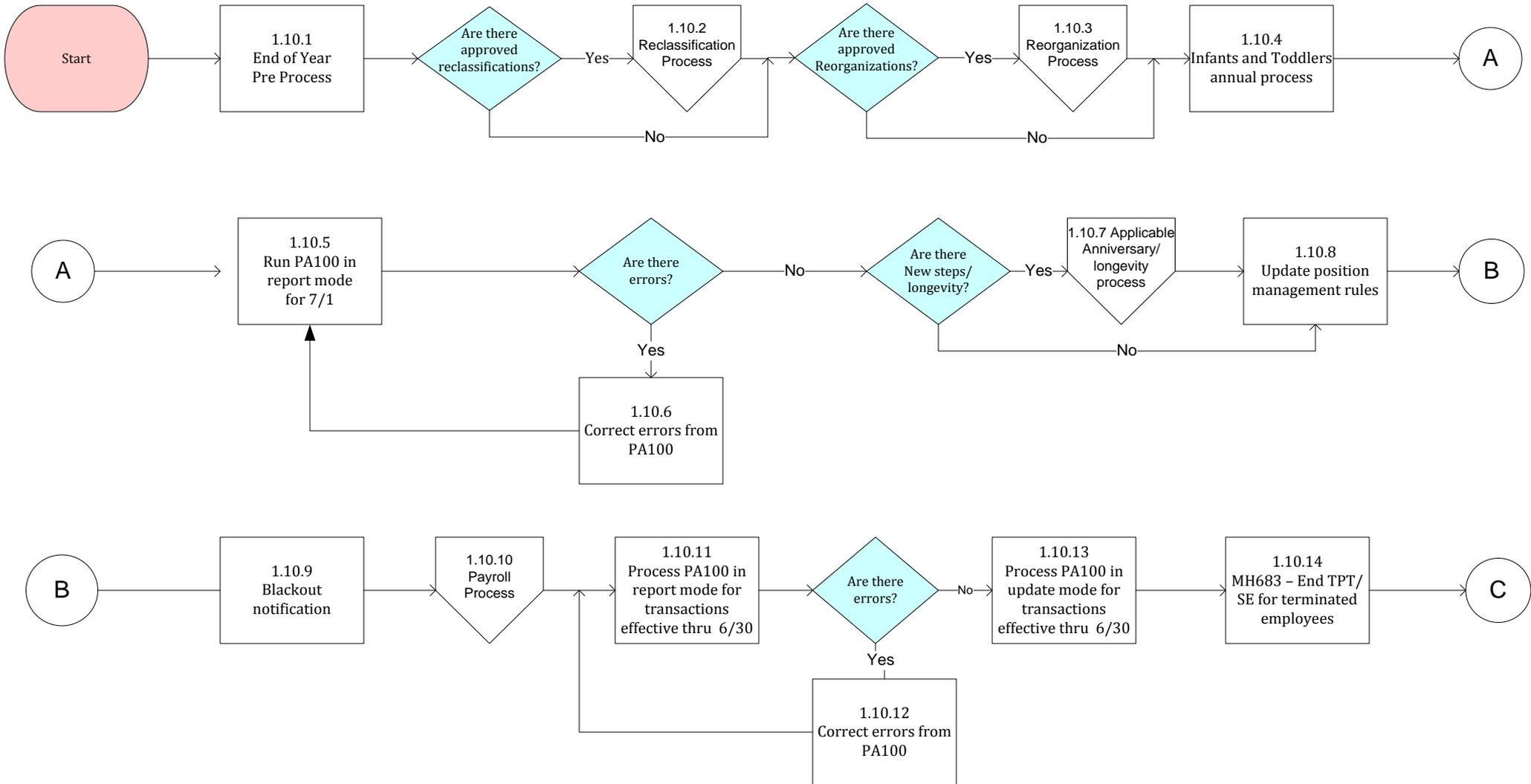




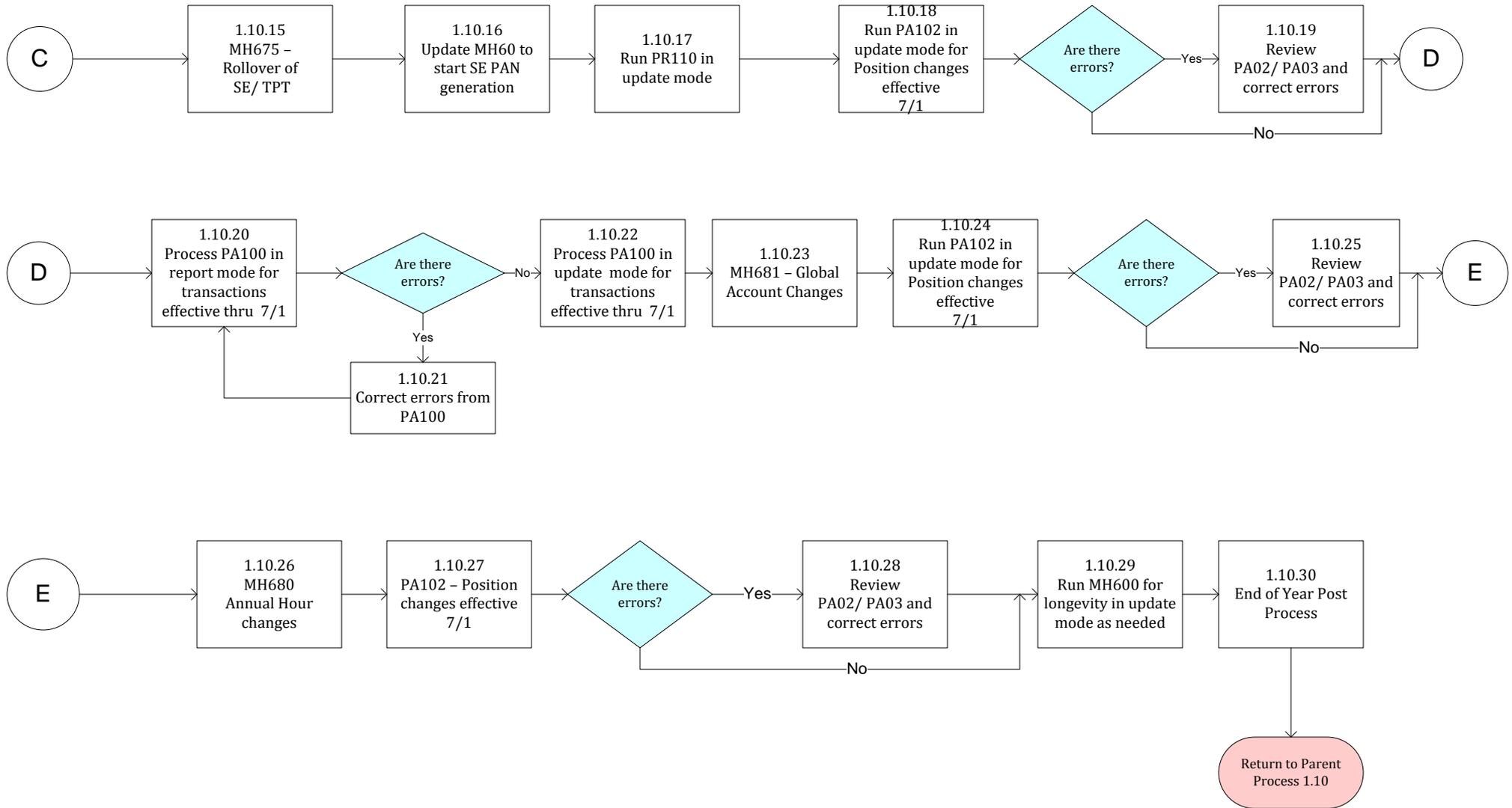
Position and Salary Administration End of Year Process – High Level View



End of Year Process Step 1.10



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Position and Salary Administration End of Year Process – High Level View

The HR End of Year process is scheduled to start the last week in June thru the first week in July of each calendar year. While the preliminary process starts in the spring, the official process does not start until after payroll has processed the payroll for the full pay period of the previous fiscal year. Once the HR End of Year process is completed, employee records in Lawson will display the new position, work location and salary information for the new fiscal year.

- 1.1 Position and Salary Administration team develops the work schedule calendar for the new fiscal year using the BOE approved school calendar as a guide. The work schedule calendar includes first work day, last work day, number of duty days, paid holidays, in-service days, no work no pay days, total paid days and annual hours for each work schedule.
- 1.2 Payroll unit develops the payroll calendar for the new fiscal year.
- 1.3 Office of the Chief Operating Officer reviews and approves the payroll and work schedule calendar for the new fiscal year.
- 1.4 Division of Controller builds work schedule calendars in HRIS using MP70.1 screen.
- 1.5 Department of Management, Budget and Planning notifies ERSC of central office reorganizations for the new fiscal year.
- 1.6 Department of Management, Budget and Planning builds and loads the budget for new fiscal year; and provides grant information for the next fiscal year.
- 1.7 Chief Financial Officer and the K-12 Operations office provide the list of schools that are eligible for Title I, single administrator, high school program and large school salary supplements for the new fiscal year.
- 1.8 Office of Human Resources and Development notifies ERSC of approved reclassifications for the new fiscal year.
- 1.9 Position and Salary Administration team and ERSC Transaction team process pending transactions effective 7/1.
- 1.10 Position and Salary Administration team process the HR End of Year activities.
- 1.11 Position and Salary Administration team sends out notice to stakeholders that blackout is over after successful completion of HR End of Year process.
- 1.12 Position and Salary Administration team generates Personnel Action Notice with the new fiscal year changes.
- 1.13 Employee receives a Personnel Action Notice (PAN) with position, work location and salary information for the new fiscal year.

1.10 End of Year Process

1.10.1 Several tasks are completed before the end of year process starts. These processes include:

- Build positions for budget load
- Build salary schedules
- SE-ECA rollover to create reference records for the new fiscal year
- Update ESY locations for summer schools
- Send higher level assignment reports to OHRD for verification. Assignments are ended or extended into new fiscal year.
- Update position management rules for FTE limit in PA06 from 1.0 to 2.0 FTE to allow the entry of pending transactions.
- Complete blackout instructions
- Distribute salary schedules and SE charts.

1.10.2 Reclassification process.

1.10.3 Reorganization process.

1.10.4 Infants and Toddler locations are provided a staff roster with their current work schedule. They are asked to add/delete staff members from their roster for the next fiscal year. They also need to indicate the work schedule the employee will follow next fiscal year (10-02 or 10-90). They are to return the rosters to ERSC for processing.

1.10.5 Run PA100 in report mode for 7/1 transactions to verify that there are no errors.

1.10.6 Correct errors that have resulted from PA100 run.

1.10.7 Applicable anniversary/longevity process will take place if new steps or new longevity increases are applied effective 7/1.

1.10.8 Update PA06 - position management rules to change the budget approved through date and the switch to allow transactions to exceed the budget. These settings allow transactions to be entered for the new fiscal year.

1.10.9 Payroll sends the first blackout notification to stakeholders. Once the payroll has completed, the Position and Salary Administration team will send an email to stakeholders notifying them that blackout continues.

1.10.10 Payroll team process the payroll for the last full pay period of the previous fiscal year.

1.10.11 Run PA100 in report mode to process pending transactions effective thru 6/30. Verify that there are no errors.

- 1.10.12 Correct errors that have resulted from PA100 run.
- 1.10.13 Run PA100 in update mode to process pending transactions effective thru 6/30. Verify that there are no errors.
- 1.10.14 Run MH683 to end temporary part time and summer employment assignments for terminated employees.
- 1.10.15 Run MH675 to roll over guaranteed summer employment and selected temporary part time employee assignments for new fiscal year. Verify and make changes to guaranteed summer employment assignments based on FTE.
- 1.10.16 Update MH60 to include assignments generated by MH675 rollover in the SE PAN generation program.
- 1.10.17 Run PR110 to convert to new fiscal year salary schedules. Verify that the correct rates are on position records.
- 1.10.18 Run PA102 to capture pending position changes effective 7/1 from PR110 run.
- 1.10.19 Review PA02/PA03 and correct errors.
- 1.10.20 Run PA100 in report mode to process pending transactions thru 7/1. Verify that there are no errors.
- 1.10.21 Correct errors that have resulted from PA100 run.
- 1.10.22 Run PA100 in update mode to process pending transactions thru 7/1. Verify that there are no errors.
- 1.10.23 Run MH681 to update accounts with budgeted and non-budgeted grants per the list provided by Department of Management, Budget and Planning.
- 1.10.24 Run PA102 to capture pending position changes effective 7/1 from MH681 run.
- 1.10.25 Review PA02/PA03 and correct errors.
- 1.10.26 Run MH680 to change annual hours of each work schedule. This is run for work schedules that have changed annual hours from previous fiscal year.
- 1.10.27 Run PA102 to capture pending position changes effective 7/1 from MH680 run.
- 1.10.28 Review PA02/PA03 and correct errors.
- 1.10.29 Run MH600 - longevity program for employees eligible for longevity increase between 7/1 and the end of the first pay period of the fiscal year.

1.10.30 Several tasks are completed at the completion of end of year process. These processes include:

- Enter Infants and Toddlers staff changes for employees to access 10-90 calendars. Enter SE records for employees who will remain in 10-02 work schedule in the new fiscal year.
- Run biweekly verification reports.
- Reset the FTE limit from 2.0 to 1.0 FTE in PA06 position and management rules.
- Update salaries of ROTC staff members using new annual hours.
- Update salaries of employees that are OFFSCALES if there are step increases or COLAs.
- Update salaries of employees in PROFHOURLY new annual hours.
- Verify that employees are not assigned to a position with an old grant number.
- Update salaries of BOE members using new annual hours.
- Verify employee eligibility for different salary supplements: Title I, single administrator, large school supplement.