

# Introduction to: Collection 5 Summer Submission

\* C5 Child Acct EOY

updated 2020



# PIMS Child Acct EOY Submission



- Overview of PIMS Child Acct EOY Submission – including Remining PIMS Reporting Dates, Templates & ACS Due Dates
- Sending District & School Abbreviation Setup
- Course Name Abbreviation Setup
- School Schedules Introduction
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- Creating New School Schedules
- Copying School Schedules
- Updating Existing School Schedules
- Clearing Student School Schedules
- Resetting Student School Schedules
- Manually Assigning Student School Schedules
- State Reporting Validation > Invalid/No Sch Schedule



# PIMS Child Acct EOY

- Inserting & Updating Time Summaries
- Purge Time Summaries
- Resetting School Schedule Summaries
- Verify School Schedules to Time Summary Links
- Correcting School Schedules to Time Summary Links
- School/Student Associations Tab
- Student/School Association Tab
- Recommended Reports
- PIMS Export Management- NEW
- Time Change \*Special Circumstance



# PIMS Child Acct EOY

## Templates Required for PIMS Child Acct EOY Submission

The following templates are required for the Child Accounting Submission:

- School Calendar
- Student Calendar Fact
- Student (not required, but necessary to update all student changes and prevent DQE errors)
- School Enrollment (not required, but required for Student dependency)

•All ClassMate PIMS Documentation can be found on our ClassMate Documentation Website  
<https://www.classmate.net/classmate-user-state-documentation/>

### PIMS Collections, Templates, & Reporting Dates

To obtain the remaining PIMS reporting dates, templates & ACS Due Dates visit the PDE website > select Manuals and Calendar to access/download the PIMS Elementary/Secondary Collection Calendar.

ClassMate recommends you check the PIMS website often as PIMS often updates this calendar through out the year.



# PIMS Child Acct EOY

## Module Requirements for Child Acct EOY

The following modules should be assigned to Child Accounting personnel:

- Base Data Information
  - Sending School Management
    - Used for entering District & School Abbreviations as needed, entering/updating School Schedules, & entering/updating Time Changes (if applicable)
- District Billing Module
  - Instructional Time Summary
    - Used for inserting/updating Time Summaries
- Curriculum Management
  - Instructional Course Offerings
    - Used for entering an 8 Letter Course Abbreviation. This task may already be completed but should be reviewed
- Student Enrollment
  - ClassMate Data Validations
  - Student Scheduling
    - Used to correct student district/school information
    - Used to assign specific school schedules to specific students on the District Updates tab – field school schedule
- PIMS Management
  - Student PIMS Information
  - **PIMS Export Management – NEW** (Necessary for PIMS Administrators to export templates)
- State Reporting
  - State Reporting Validations

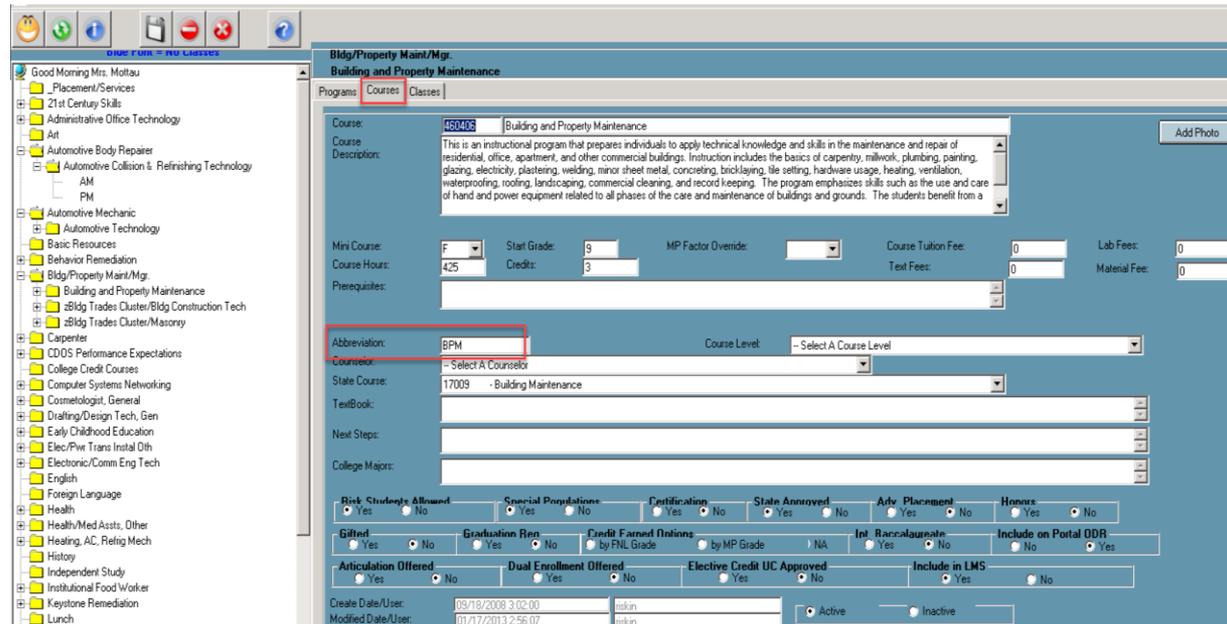
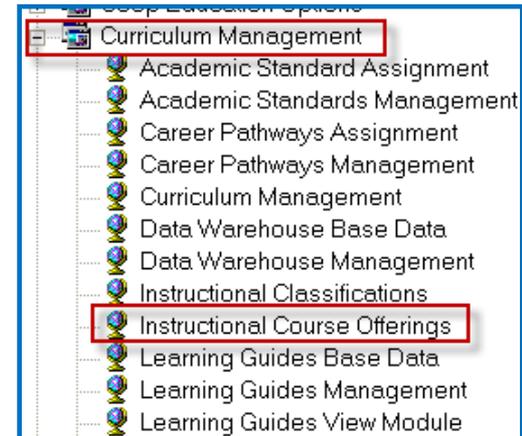
**If you do not have the above listed modules, please contact the ClassMate System Administrator for your site so that they can be assigned to you.**

## Course Name Abbreviation Setup

Modules > Curriculum Management > Instructional Course Offerings

All Courses must have an abbreviation in ClassMate.  
Follow these steps to enter any that are missing:

1. Select a **Program Name** and click the **+** to left to expand and display the Courses
2. Select a **Course Name** by single clicking the name
3. Enter up to an 8-letter abbreviation in the **Abbreviation Box**
4. Click the **SAVE** icon
5. Repeat for all Courses



# PIMS Child Acct EOY



## Sending District & School Abbreviation Setup

Modules > Base Data Information > Sending School Management

All Districts must have abbreviations in the system.  
Follow these steps for any District that does not:

1. Select a **District Name**.
2. Enter a 3-4 letter abbreviation in the **Abbreviation Box**
3. Click the **SAVE** icon



**Apple City School District**

**Watermelon High School**

District | School | School Schedules | School Schedule Changes

District AUN: 121-390-302 Apple City School District

Address 1: 31 S Penn Street

Address 2: P.O. Box 328

City: Allentown, PA Zip Code:

County: Lehigh County

Phone Number: (484) 765-4000 Ext: 800 Number: ( ) -

Fax Number: ( ) - **Abbreviation: AASD**

Current Year %: 0 Previous Year %: 0

Member District: T CEP Lunch Site:  No  Yes

Alternate Code: District Portal: Minimum Passing Grade: 60

Available for ODR Import:  No  Yes

Create Date: 08/25/2003 1:38:58



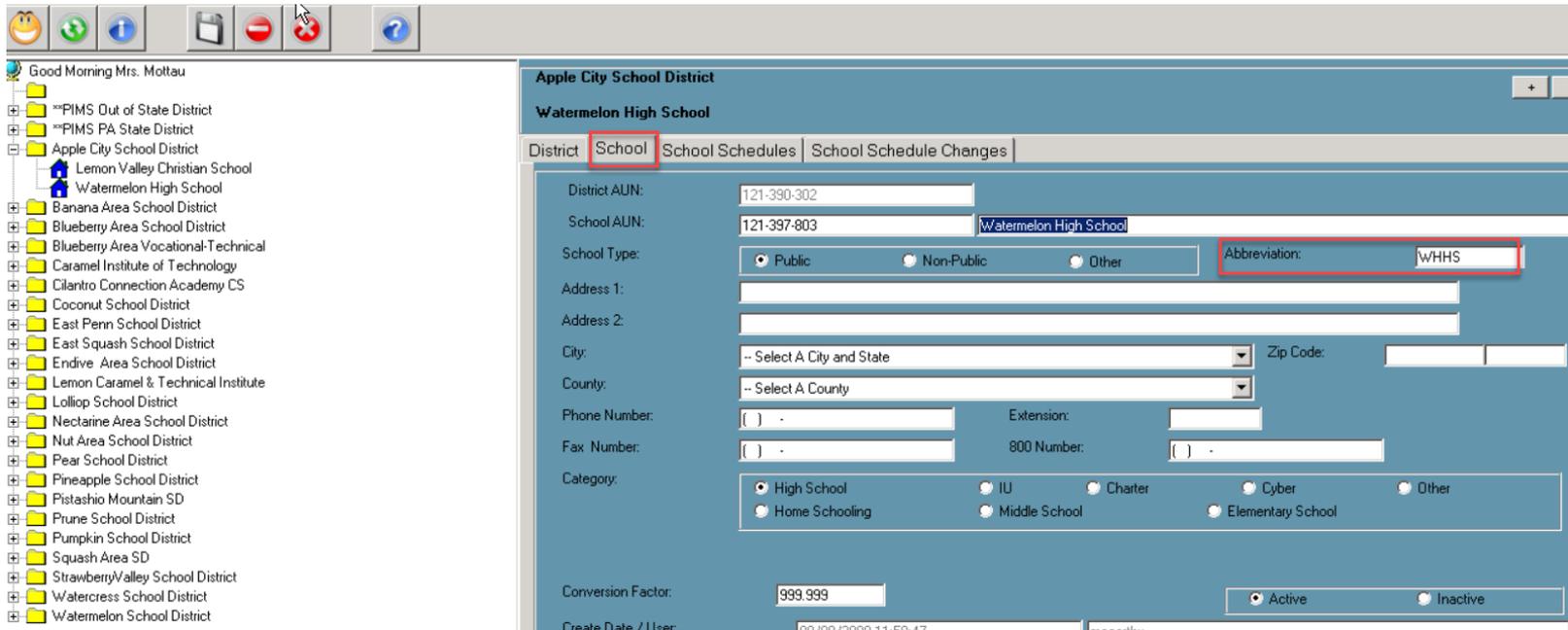
# PIMS Child Acct EOY

## Sending District & School Abbreviation Setup, continued

All Schools must also have an abbreviation in the system.

Follow these steps to add any that are missing:

1. Click the **+** to left of the District Name to expand and display the sending schools
2. Select a **School Name** by single clicking
3. Enter a 3-4 letter abbreviation in the **Abbreviation Box**
4. Click the **SAVE** icon



The screenshot shows the software interface for setting up a school. On the left is a tree view of districts and schools. The main area displays the configuration for 'Watermelon High School' under the 'Apple City School District'. The 'Abbreviation' field is highlighted with a red box and contains the text 'WHHS'. Other fields include District AUN (121-390-302), School AUN (121-397-803), School Type (Public selected), Address 1 and 2, City, County, Phone Number, Fax Number, Category (High School selected), and Conversion Factor (999.999). The 'Active' radio button is selected.



# PIMS Child Acct EOY

## SCHOOL Schedules Introduction

The purpose of School Schedules is so that the days attending and start/end times of a particular sending school can be recorded in ClassMate.

School Schedules can be saved and used for multiple school years. During rollover, the School Schedules automatically are updated to the new school year so that they can be used again with little or no updates.

However, if a site wishes to delete (purge) their School Schedules and start fresh each year they may do so, this is typically done at the beginning of the School Year. \*this is NOT a requirement\*

There are two modules where a site can purge their School Schedules:

- The first module is located under **Modules > Base Data Information > Sending School Management**
- The second module is located under **Modules > District Billing > Instructional Time Summaries > Procedures tab**



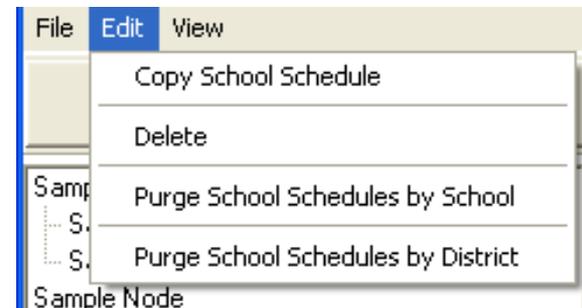
# PIMS Child Acct EOY

- SCHOOL Schedules: Purging Previous Schedules**

Modules > Base Data Information > Sending School Management

To purge schedules by District or by School via the Sending School Management module:

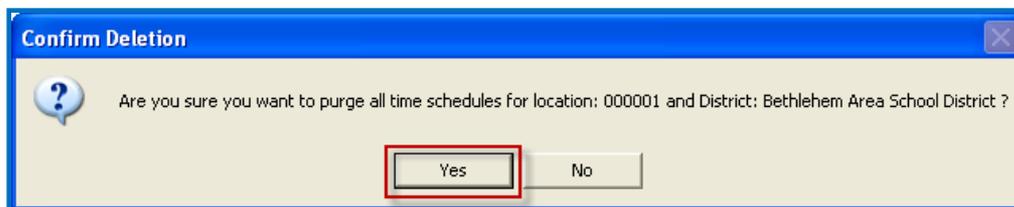
- Click on a District Name
- Click the Edit menu and choose:
  - **Purge School Schedules by District.** If a District will be participating in different school schedules for the school year this will purge all School Schedules for all schools under the District you selected.
  - OR -
  - **Purge School Schedules by School.** If a School will be participating in different school schedules for the school year to purge, this will then require you to click on a School under the District you have chosen, and it will then delete the School Schedules for that school ONLY.



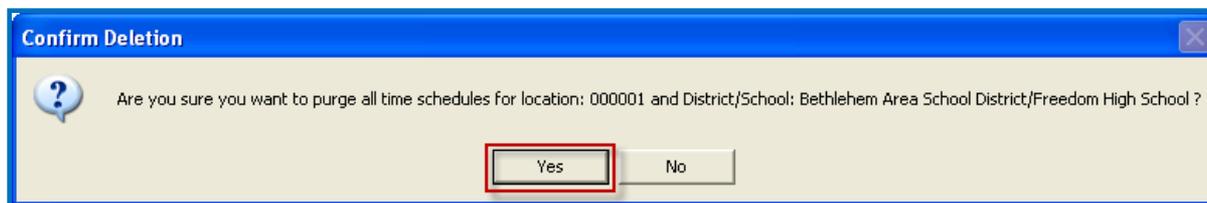
# PIMS Child Acct EOY

- SCHOOL Schedules Introduction: Purging Previous Schedules, continued**

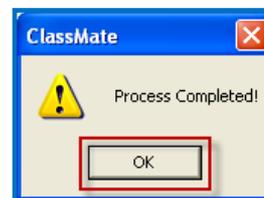
If purging by District click Yes to “Are you sure you want to purge all time (school) schedules for location: and District?”



If purging by School click Yes to “Are you sure you want to purge all time (school) schedules for location: and District/School?”



- Click OK when the Process Completed! Window appears

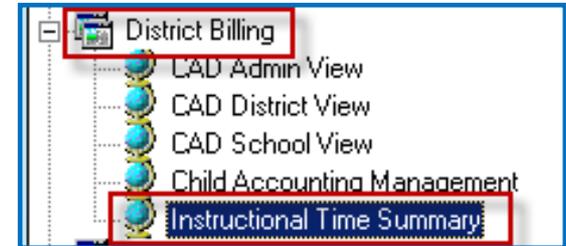


## SCHOOL Schedules Introduction: Purging Previous Schedules, continued

Modules > District Billing > Instructional Time Summary

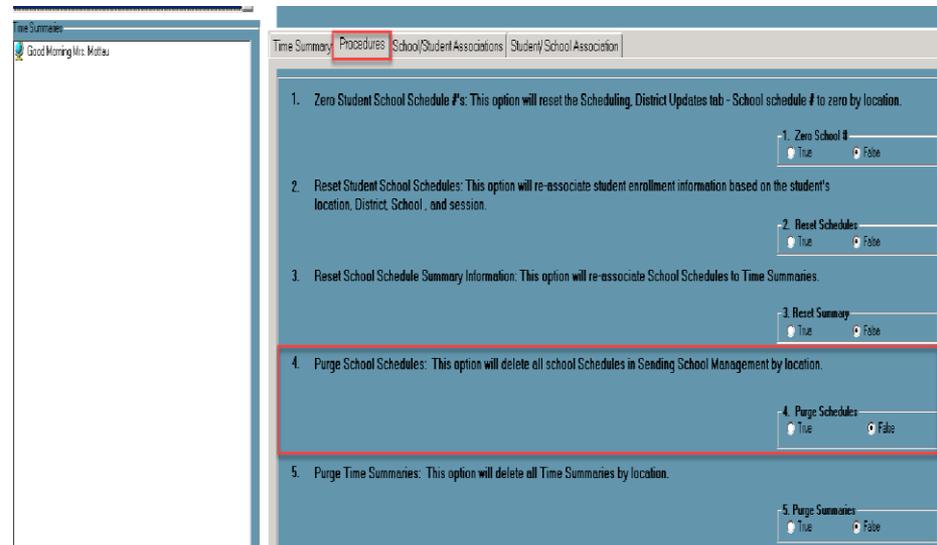
You may also purge previous schedules via the Instructional Time Summary module.

*\*\*Be Careful when selecting to be certain you WANT to purge and not just manually adjust – purging cannot be undone \*\**



1. Open the Instructional Time Summary module.
2. Click the Procedures tab.
3. # 4:Purge School Schedules: This option will delete all School Schedules by Location.
4. To perform the process, click True.
5. You will be prompted with the message, “Are you sure you want to purge School Schedules for location?”
6. If you are sure, click Yes.

If your site has multiple locations, you will need to repeat for each location by first selecting the location and then repeating these steps.



Selecting any of the **PURGE** selections will display a pop-up window asking your to confirm before it processes the **PURGE** the **RESETS** automatically process



# PIMS Child Acct EOY

## Creating New SCHOOL Schedules

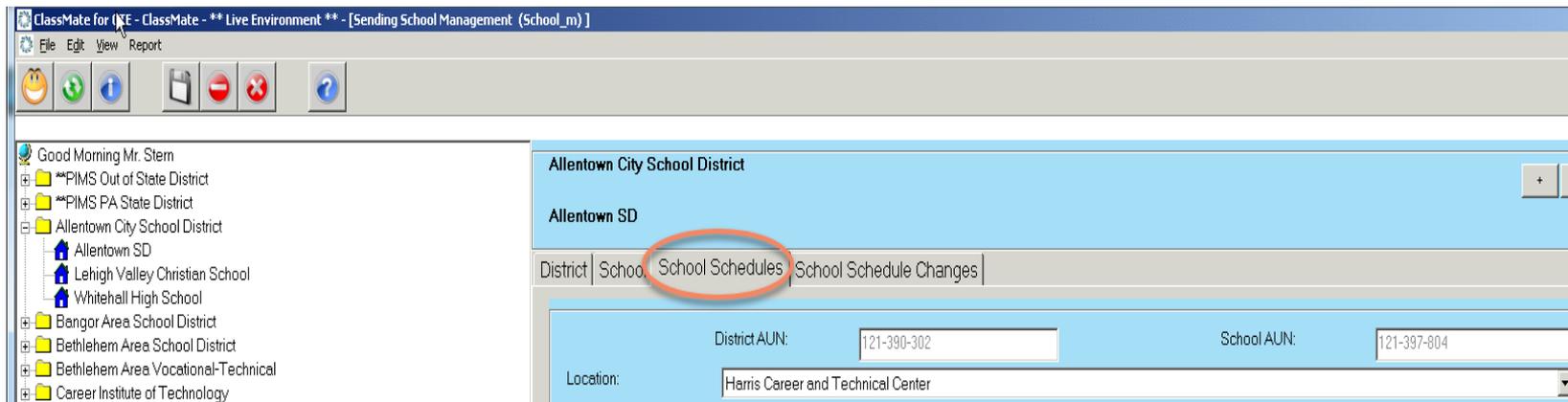
Modules > Base Data Information > Sending School Management

You are now ready to create a new School Schedule.  
Start with the following steps:

1. Select a **District Name** and click the + to left to expand and display the sending schools.
2. Select a **School Name** by single clicking.
3. Click the **School Schedules Tab**.



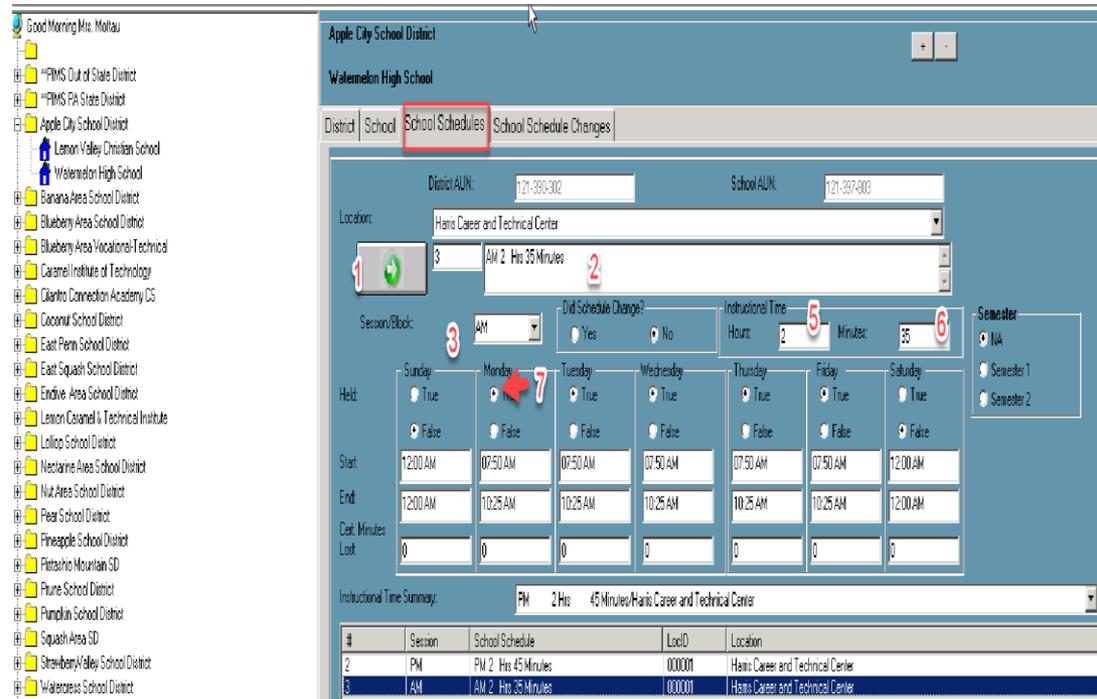
We recommend you work with your largest District to create all school schedules for which the district students will participate. Then from your largest District you can COPY those school schedules to other



## Creating New SCHOOL Schedules, continued

On the School Schedules tab for the desired school, perform the following steps to create a new schedule:

1. Click the **Green Arrow** button to create the next consecutive **Schedule ID**.
2. Enter the **Schedule Name**.
3. Select the **Schedule Block** from the drop-down menu (example: AM)
4. Enter the Instructional Time for the Schedule in the next two steps:
5. Enter the Instructional Hours in the Hours box (example: 2).
6. Enter the Instructional Minutes in the Minutes box (example: 35).
7. Click the radio button for **“True”** to identify the scheduled days being offered.
8. Enter the **Start Time**
9. Enter the **End Time**
10. Click **“Save”**.



The screenshot shows the 'School Schedules' tab for 'Watermelon High School'. The form includes fields for District AUN, School AUN, Location, and Session Block. The 'Did Schedule Change?' section has radio buttons for 'Yes' and 'No'. The 'Instructional Time' section has 'Hours' and 'Minutes' inputs. A grid shows days of the week with 'True' or 'False' radio buttons. A table at the bottom lists existing schedules.

#	Session	School Schedule	LocID	Location
2	PM	PM 2 Hrs 45 Minutes	000001	Harris Career and Technical Center
3	AM	AM 2 Hrs 35 Minutes	000001	Harris Career and Technical Center



# PIMS Child Acct EOY



## Certification Minutes Lost (for clients utilizing CM Certification Reporting Add-On Option ONLY)

The Hours and minutes associated with this module are related to state reporting. If the sending school instructional time is 2 hr and 15 minutes, then the Cert Hours Lost would be 30 minutes if the period instructions hours are 2 hr and 45 min.

Double click **My Modules** > Double Click **Base Data Information** > Click **Sending School Management**

- Select a **School**
- Click **School Schedules Tab**
- For Each present or created
- Enter **Lost Minute Deductions**
- Click **“Save”**

**Note:** It is critical that lost minutes be formatted

#	Session	School Schedule	LocID	Location
2	PM	PM 2 Hrs 45 Minutes	000001	Harris Career and Technical Center
3	AM	AM 2 Hrs 35 Minutes	000001	Harris Career and Technical Center

i.e. if instructional time is 1 hr 50 min. & Standard period is 2 hr and 20 min then **LOSS** is 30 minutes.

# PIMS Child Acct EOY

## Copying SCHOOL Schedules

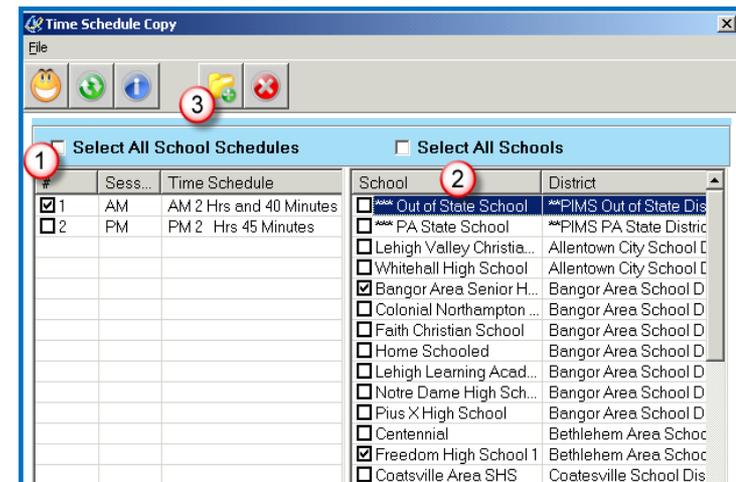
If there are multiple schools that share the same schedule, create the schedule once and then copy it to the other schools. You can copy multiple schedules to multiple schools in various districts in one set of steps.

- Example: If you have many schools where the AM session starts at 08:00AM and ends at 10:45AM you can create one School Schedule in one school & copy it to the other schools.
- First, click on the Edit menu and choose “Copy School Schedule” which will open a new window and then follow these steps:
  1. Select the schedule(s) you wish to copy on the left side list of schedules.
  2. Select the schools you wish to copy to on the right-side list of schools.
  3. Click the Yellow folder icon (“Assign”)

If there are schools that start and end at different times, you will need to create School Schedules for each school, for each session that is different.

Example: If a school has a specific bus that arrives 15 minutes later than other busses for the AM session then you would need to create an additional AM Session School Schedule for that school.

ie. 1 session is the standard block for 2 hrs & 45 min – this will be entered first. The alternate session is 2 hrs & 30 min – is entered next, students participating in this alternate session will need to be MANUALLY associated to this alternate school schedule individually using Student Scheduling > District Updates tab > School Schedule



# PIMS Child Acct EOY

## Updating Existing SCHOOL Schedules

If your site chooses to update the existing School Schedules from last year you will need to perform the following:

1. Run the District Billing > Sending Schools Time Schedules report
2. Identify which School Schedules have changes or are no longer valid
3. Go to each District/School in Sending School Management module
4. Click on the existing School Schedule
5. Enter the Instructional Hours in the Hours box.
6. Enter the Instructional Minutes in the Minutes box.
7. Verify the Start Time – if the start time for this school year was changed from what it was last school year make the necessary adjustments.
8. Enter the End Time – if the end time for this school year was changed from what it was last school year make the necessary adjustments
9. Click Save
10. Repeat process for all other Existing School Schedules that you are re-using.
11. Lastly, re-run Sending School Time Schedules report and verify all your recent changes are complete

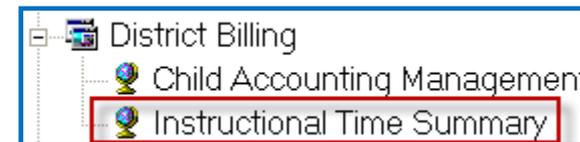


# PIMS Child Acct EOY

## Clearing STUDENT School Schedules

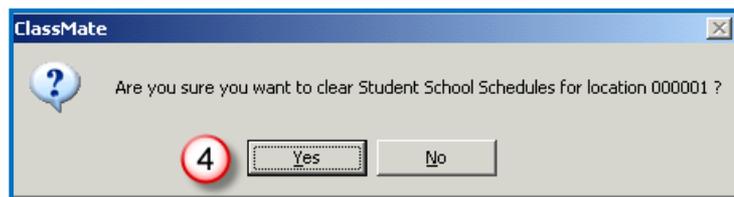
This process should be completed once, prior to starting all assignments for the New School Year. This process clears the student school schedules that have been assigned to the student's enrollment record in Student Scheduling module >

District Updates tab > School Schedule field

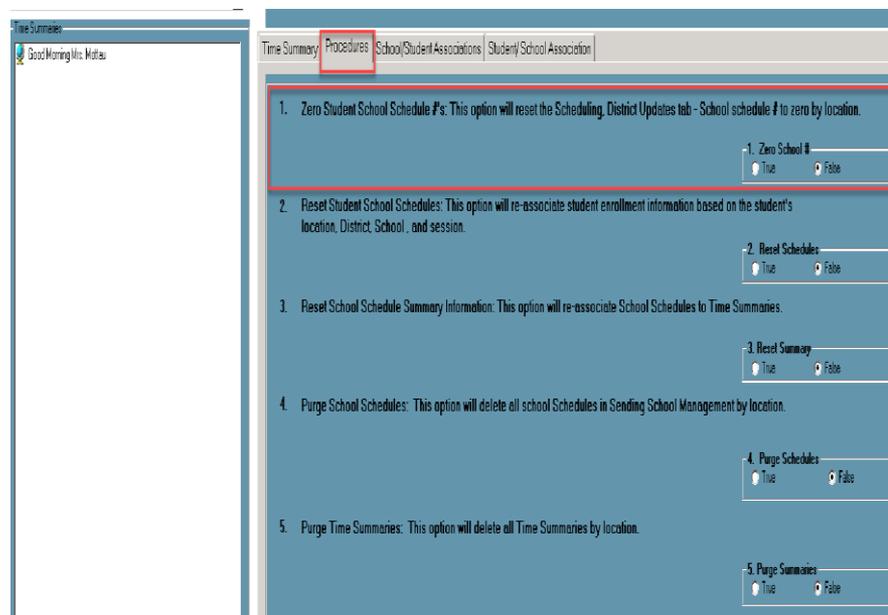


Modules > District Billing > Instructional Time Summary

1. Click Procedures tab.
2. Select Location (if applicable)
3. #1 Zero Student School Schedules #'s > Click True
4. Click Yes when prompted, "Are you sure..."
5. There is no need to save. The Process Complete message will appear when finished, click OK.



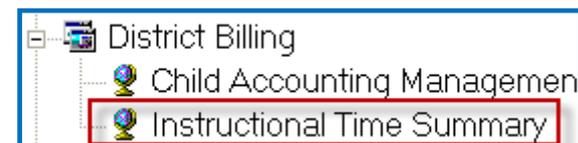
- Multi-Location schools will need to repeat these steps for each location.
- This can be run any time if major adjustments are needed



# PIMS Child Acct EOY

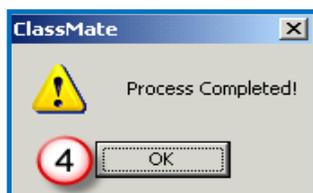
## Resetting STUDENT School Schedules

After clearing all student school schedule assignments, it is likely your next step will be to reset all student's schedule assignments to the newly created schedules. This re-assigns student enrollment school schedule with the appropriate school schedule # based on the criteria previously identified.

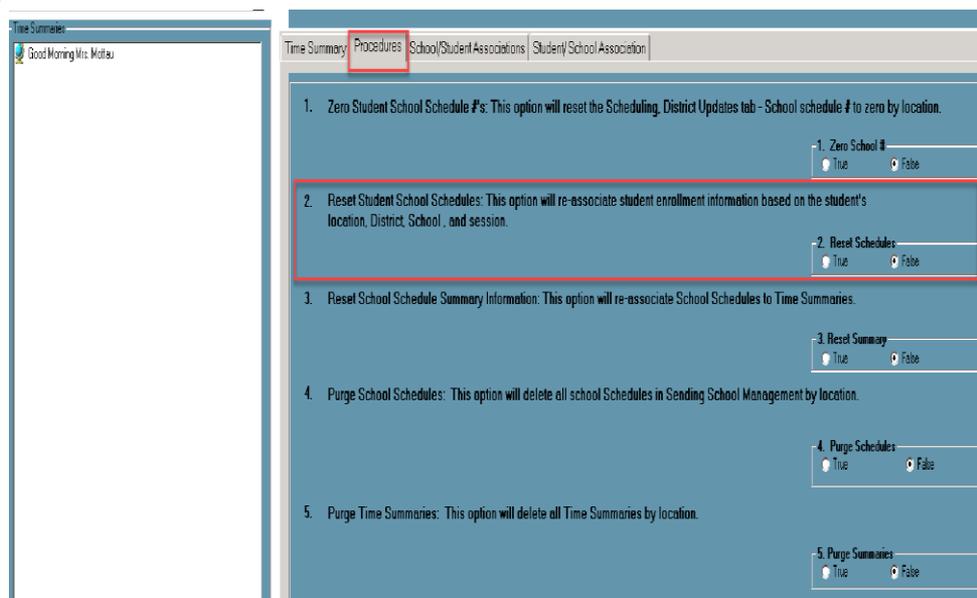


### Modules > District Billing > Instructional Time Summary

1. Click Procedures tab.
2. Select Location (if applicable)
3. #2 Reset Student School Schedules > click True
4. There is no need to save. The Process Complete message will appear when finished, click OK.



All student's School Schedule assignments in Student Scheduling > District Updates will now be reset to the default (numerically first) AM or PM School Schedule for the school in which the student is enrolled.



Note: Multi-Location schools will need to repeat these steps for each location.

# PIMS Child Acct EOY

## Default STUDENT School Schedules

After the Reset Student School Schedule process is complete, each student is assigned a School Schedule by default, based on their District, School, and Session as reflected in Student Scheduling > District Updates tab.

Automation order:

1. Attending District/School from Student Scheduling > District Updates tab
2. Enrollment Location/Calendar from Student Scheduling > District Updates tab
3. Scheduled Class Session from Student Scheduling > Change Existing tab

The default schedule for AM or PM is the first (numerically lowest) schedule of AM or PM on the School Schedules tab of a particular school in the Base Data / Sending School Management module.

Example: Jane Doe is enrolled in School ABC of District XYZ in the AM session. School ABC may have 3 different AM and 3 different PM session School Schedules, but Jane will be reset to whichever AM session School Schedule has the lowest numeric ID # in School ABC's Sending School Management / School Schedules tab.

If you have any students that do **NOT** adhere to the default school schedule, you will need to **manually** update the schedule for those students individually in Student Scheduling > District Updates tab > School Schedule field.

Example: John Smith is also enrolled in School ABC of District XYZ in the AM session, but John rides a bus which has a route that makes it arrive 15 minutes later every day than the normal start time. John will have to be manually assigned a School Schedule that has been created for School ABC that has a later start time.



# PIMS Child Acct EOY



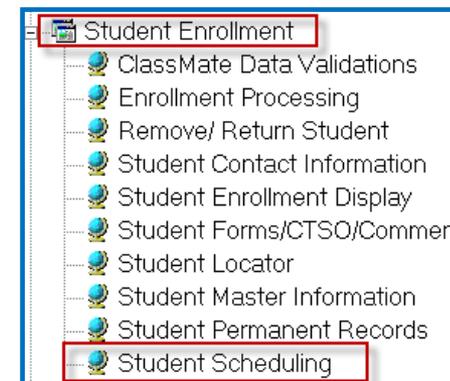
## Assigning Student School Schedules

To assign a particular School Schedule to a particular student:

Double Click **Modules** > Double click **Student Enrollment** > Click **Student Scheduling**

1. Click the Student's Name on the left-hand list.
2. Click the District Updates Tab.
3. Select the Course.
4. Enter the School Schedule Number you want to assign. School Schedule #'s are assigned based on the attending District/school and Student's AM/PM /FD period session. Use the number of the School Schedule from the School Schedules tab of the Sending School Management for the student's attending district /school, not the Time Summary #.
5. Click Save

Repeat as necessary for any additional courses or students.



The screenshot shows the PIMS software interface. On the left, a list of students is displayed, with Archie R. Atkins highlighted. The main window shows the 'District Updates' tab for Archie R. Atkins. The 'School Schedule' field is set to 3. The 'Entry Status' is E98\_00. The 'Begin Date' is 08/27/2018 and the 'End Date' is 01/01/1900. The 'Calendar' is 201819. A table at the bottom shows the student's enrollment history.

#	Grade	Course	Entry	Withdwl
99	12	Professional Develop	E98_00	
2	11	Physical Education	E05_00	
1	12	Computer Networking	E98_00	



# PIMS Child Acct EOY

## State Reporting Validations

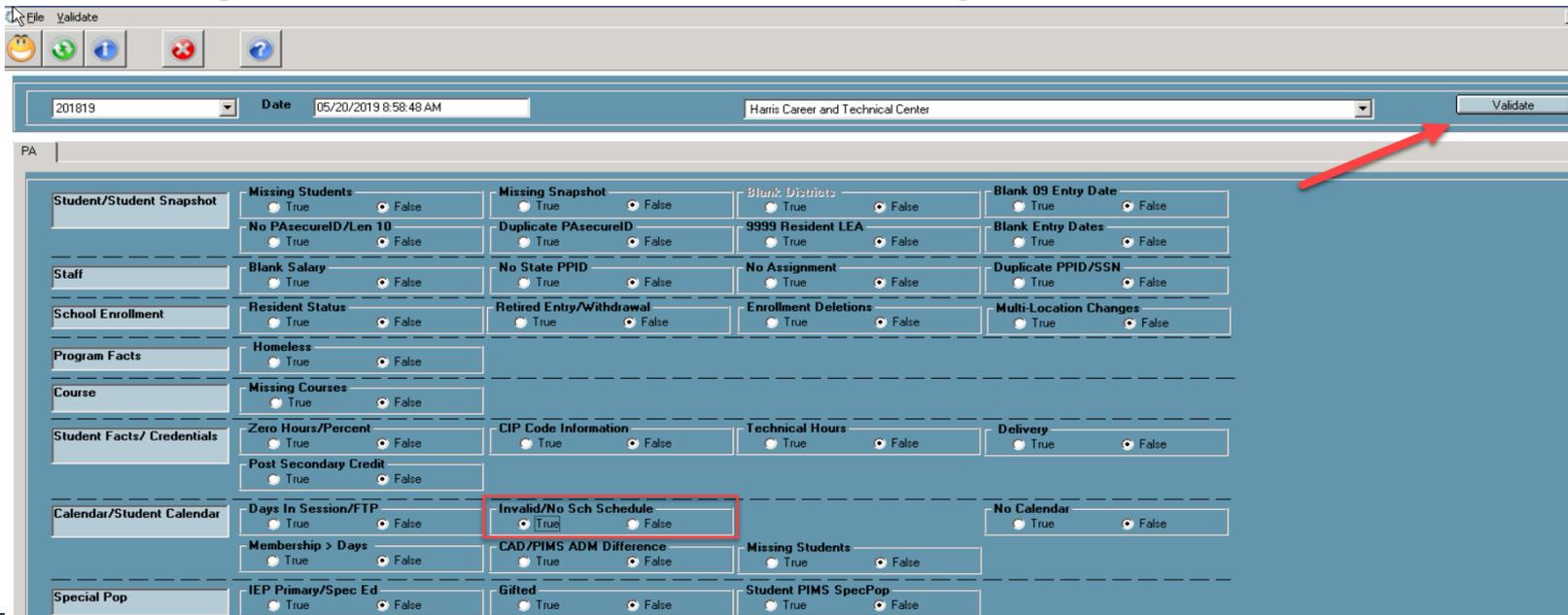
Calendar/Student Calendar > select \*True Invalid/No Sch Schedule > Validate

### \* No School Schedule:

> Student has a 0 in their enrollment School Schedule field. Using the Student Assignment Criteria previously defined, identify the proper School Schedule #, enter it in the field, and Save.

### \* Invalid School Schedule:

> Student has a # entered in the school schedule field; however, that # does not exist in Sending School Management- School Schedules tab for the student assignment criteria.



The screenshot shows the PIMS software interface for validating a student's enrollment. The top navigation bar includes a 'Validate' button, which is highlighted with a red arrow. Below the navigation bar, the interface displays a grid of validation checkboxes for various categories. The 'Calendar/Student Calendar' section is expanded, and the 'Invalid/No Sch Schedule' checkbox is highlighted with a red box. The 'Validate' button is located in the top right corner of the interface.

Category	Field Name	True	False
Student/Student Snapshot	Missing Students	<input type="radio"/>	<input type="radio"/>
	No PAsecureID/Len 10	<input type="radio"/>	<input type="radio"/>
Staff	Blank Salary	<input type="radio"/>	<input type="radio"/>
	Resident Status	<input type="radio"/>	<input type="radio"/>
School Enrollment	Retired Entry/Withdrawal	<input type="radio"/>	<input type="radio"/>
	Homeless	<input type="radio"/>	<input type="radio"/>
Program Facts	Missing Courses	<input type="radio"/>	<input type="radio"/>
	Zero Hours/Percent	<input type="radio"/>	<input type="radio"/>
Course	Post Secondary Credit	<input type="radio"/>	<input type="radio"/>
	CIP Code Information	<input type="radio"/>	<input type="radio"/>
Student Facts/ Credentials	Technical Hours	<input type="radio"/>	<input type="radio"/>
	Delivery	<input type="radio"/>	<input type="radio"/>
Calendar/Student Calendar	Days In Session/FTP	<input type="radio"/>	<input type="radio"/>
	Membership > Days	<input type="radio"/>	<input type="radio"/>
Special Pop	IEP Primary/Spec Ed	<input type="radio"/>	<input type="radio"/>
	Gifted	<input type="radio"/>	<input type="radio"/>

# PIMS Child Acct EOY



## Inserting & Updating Time Summaries Introduction

**At this time we recommend and stress the importance to Insert Time Summaries early and start Validating the school schedule links and student links; however, please wait to update Time Summary information until after the school year closes.**

While working on this process please do not finalize the Time Summary information like rotation pattern, graduation dates, etc until after the school year closes – the reason is that if you update all of your time summary data, then you have an unexpected school closing or snow day that adjusts the School Calendars you will have to purge the time summary data and re-insert. All of your updates will be lost.

### **Please be sure the following steps have been completed:**

- All School Schedules have been entered and validated
- The School Calendar has been verified for the following:
  - > all Snow Days/Other days have been entered
  - > all Make up Days have been properly flagged
  - > all Holidays have been entered
  - > all Teacher In-service Days have been entered
- all Act 80 days have been entered
- all Strike Days have been entered
- all Makeup and Days Added have been properly flagged

### **\* VERY IMPORTANT: the Student Last Day is correctly displaying the # of days in session in School Calendar Management \***

i.e. If the Last Student Day is June 12, 20xx and the LEA is in session 180 days, when clicking on June 12, 201xx the day in session should display 180.

If the # displayed is not 180, do not proceed until the calendar has been corrected and the days in session displays 180.



## Inserting & Updating Time Summaries

Modules > District Billing > Instructional Time Summary

- Click **“Edit”** located on the toolbar along the top of the screen
- Click **“Insert Time Summaries”**

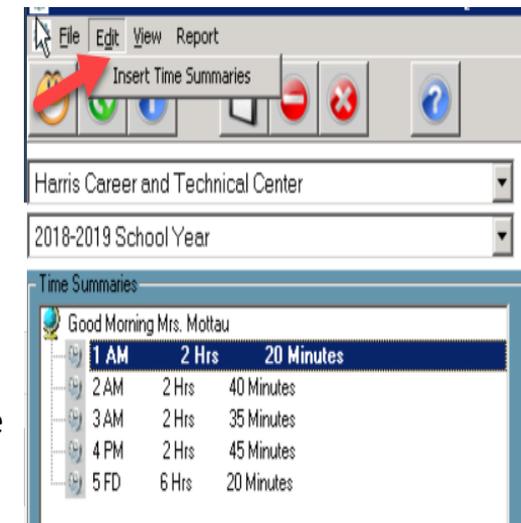
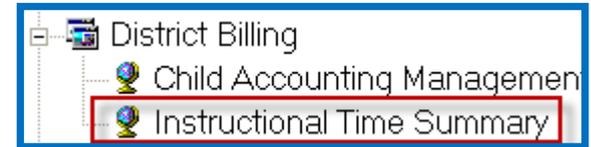
This will insert 1 time summary for each **unique** school schedule that you entered in the Sending School Management module.

Example: If you had 1 AM school schedule that you copied to all schools, you will only have 1 AM time summary.

\*\* If you have a **“special”** schedule (for ex: only attending M-W-F) for a specific session (AM / PM) and it is duplicated in another Sending School please be aware this **“Special”** schedule will only show as ONE Time Schedule in Instructional Time Summaries (for ex: AM-Special / PM-Special)

This **“special”** schedule will then need to be assigned to ALL applicable Sending School Schedules in Sending School Management.

During the insert process the school schedules are linked to the unique time summary just created. However, it is best practice to verify all school schedules have been properly linked to a time summary in Sending School Management > School Schedule tab > Instructional Time Summary dropdown.



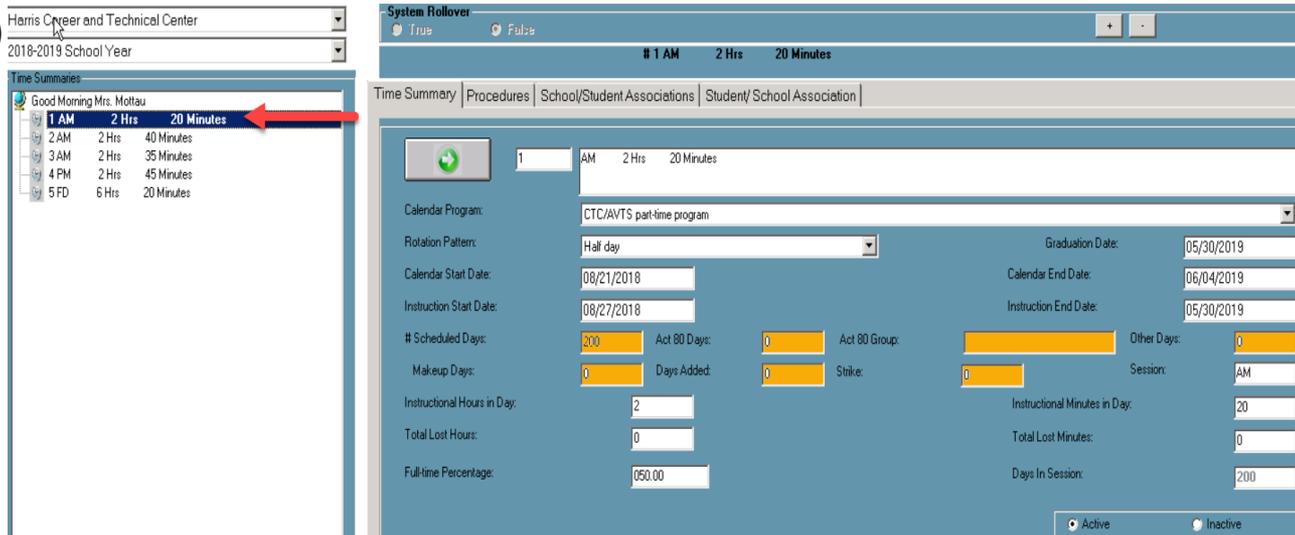
# PIMS Child Acct EOY

## Inserting & Updating Time Summaries, continued

Select a Time Summary to Review & Update

Review the following **Yellow** Highlighted Fields:

- Number Scheduled Days
- Act 80 Days
- Act 80 Group – this is a unique 12-digit identifier which are the 12 digits users entered on the PDE portal when they submitted the Act 80 days for approval.
- Other Days (Snow)
- Makeup Days
- Days Added
- Strike



The screenshot shows the PIMS Child Acct EOY interface. On the left, a 'Time Summaries' list is displayed for 'Good Morning Mrs. Mottau'. The entry '1 AM 2 Hrs 20 Minutes' is highlighted in blue, with a red arrow pointing to it. The main area shows the details for this summary, including a 'System Holver' section with 'True' and 'False' options, and a 'Time Summary' section with a green plus icon. Below this, various fields are shown, some highlighted in yellow to indicate they are the focus of the review:

- Calendar Program: CTC/AVTS part-time program
- Rotation Pattern: Half day
- Calendar Start Date: 08/21/2018
- Instruction Start Date: 08/27/2018
- Graduation Date: 05/30/2019
- Calendar End Date: 06/04/2019
- Instruction End Date: 05/30/2019
- # Scheduled Days: 30 (highlighted yellow)
- Act 80 Days: 0 (highlighted yellow)
- Act 80 Group: (highlighted yellow)
- Other Days: 0 (highlighted yellow)
- Makeup Days: 0 (highlighted yellow)
- Days Added: 0 (highlighted yellow)
- Strike: 0 (highlighted yellow)
- Session: AM
- Instructional Hours in Day: 2
- Instructional Minutes in Day: 20
- Total Lost Hours: 0
- Total Lost Minutes: 0
- Full-time Percentage: 050.00
- Days In Session: 200

**\*Note:** Should you find an error in ANY of these fields (except the Act 80 group which must be edited in this module), we strongly recommend that you do not edit the totals here but fix the calendar in the **School Calendar Management** module.

# PIMS Child Acct EOY



## Inserting & Updating Time Summaries, continued

### Sample Scenario:

While reviewing the Act 80 field it is determined that you have 1 ACT 80 day that is not appearing in your Time Summary. You must edit the date of your ACT 80 day in **School Calendar Management**. The day has either been classified incorrectly (In-service day) or has not been identified at all. After changing the day, click the **Orange Save** button.

Once any updates have been made in your School Calendar you will have to return to Instructional Time Summary > purge your Time Summaries and then Insert again to update with your changes.

Day Type	Type Code	
** Strike	001411	2
** ACT 80 Day	001410	6
**Other	001408	1
**Holiday - Staff	001407	1
**Holiday - Faculty only (...)	001406	1
**Weekend	001405	1
**Saturday field trip	001404	1
** Teacher In-Service Day	001402	1
** Administration Reports ...	001401	1



# PIMS Child Acct EOY

## Purge Time Summaries

Purge Time Summaries is for when you have a School Calendar Change. Purge all time summaries and re-insert so that the updated school calendar information is properly populated in your time summaries.

If you must perform the purge Time Summaries process all manual updates to the Time Summaries will be removed.

If a site must purge Time Summaries the following steps will need to be performed:

- 1) Go to Modules > District Billing > Instructional Time Summary.
- 2) Click the Procedures Tab.
- 3) Go to Step 5: Purge Time Summaries: This option will delete all Time Summaries by Location.
- 4) Click True.
- 5) You will be prompted by a message saying: “Are you sure you want to Purge Time Summaries for Location” - if you are sure click Yes.
- 6) Repeat these steps if your site has multiple locations that have also incurred a School Calendar change that has affected Time Summaries.

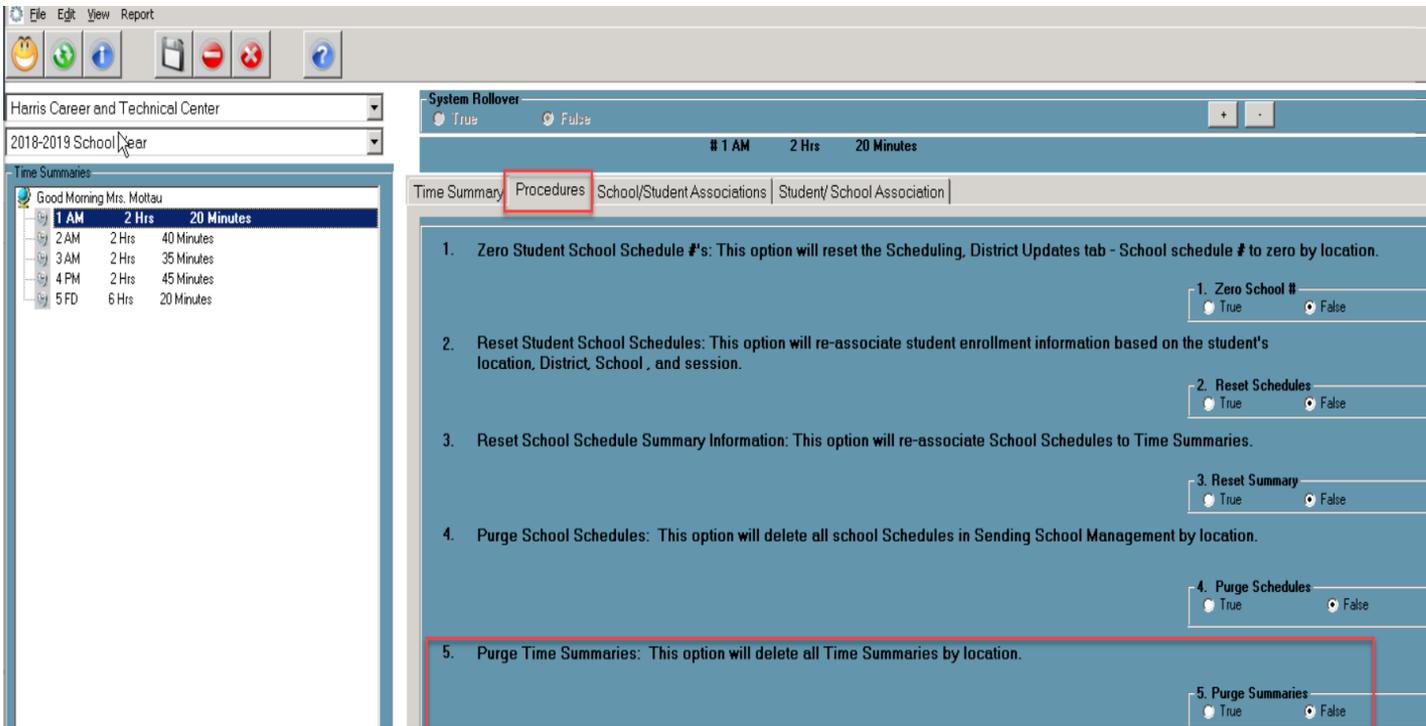
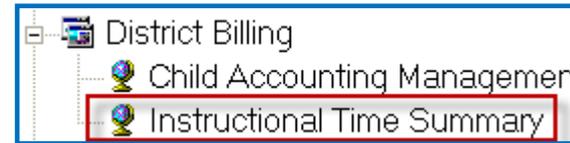
Each time you purge you will need to re-enter the following data:

Act 80 Group Information  
Total Lost Hours/Minutes



# PIMS Child Acct EOY

## Purge Time Summaries



Harris Career and Technical Center  
2018-2019 School Year

Time Summaries

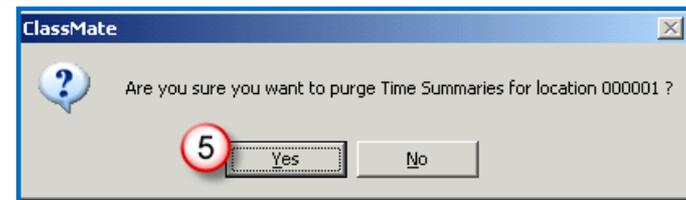
Time	District	Session
1 AM	2 Hrs	20 Minutes
2 AM	2 Hrs	40 Minutes
3 AM	2 Hrs	35 Minutes
4 PM	2 Hrs	45 Minutes
5 FD	6 Hrs	20 Minutes

System Rollover: True False

# 1 AM 2 Hrs 20 Minutes

Time Summary Procedures School/Student Associations Student/ School Association

1. Zero Student School Schedule #'s: This option will reset the Scheduling, District Updates tab - School schedule # to zero by location.  
 True  False
2. Reset Student School Schedules: This option will re-associate student enrollment information based on the student's location, District, School, and session.  
 True  False
3. Reset School Schedule Summary Information: This option will re-associate School Schedules to Time Summaries.  
 True  False
4. Purge School Schedules: This option will delete all school Schedules in Sending School Management by location.  
 True  False
5. Purge Time Summaries: This option will delete all Time Summaries by location.  
 True  False



ClassMate

Are you sure you want to purge Time Summaries for location 000001 ?

5 Yes No



# PIMS Child Acct EOY

## Inserting & Updating Time Summaries, continued

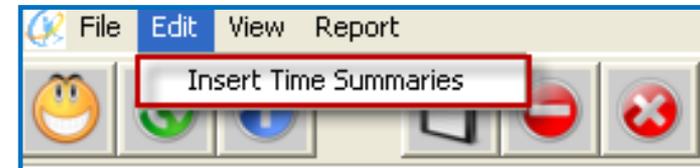
After all the corrections have been made in the School Calendar Module, you should then return to:

**Modules > District Billing > Instructional Time Summary Module**

You **Must** Re-Insert the Time Summaries after making updates to the Calendar:

1. Click **“Edit”** located on the toolbar along the top of the screen
2. Click **“Insert Time Summaries”**

The changes made to the calendar days are now reflected, however, any “manual” edits that were previously made were Removed with the Purge and will have to be re-entered (such as Act 80 Group, Total Lost Min/Hrs, Any other manually made changes)



Calendar Start Date:	<input type="text" value="08/21/2018"/>	Calendar End Date:	<input type="text" value="06/04/2019"/>
Instruction Start Date:	<input type="text" value="08/27/2018"/>	Instruction End Date:	<input type="text" value="05/30/2019"/>
# Scheduled Days:	<input type="text" value="200"/>	Act 80 Days:	<input type="text" value="1"/>
Makeup Days:	<input type="text" value="0"/>	Days Added:	<input type="text" value="0"/>
Instructional Hours in Day:	<input type="text" value="2"/>	Act 80 Group:	<input type="text" value="149305923679"/>
Total Lost Hours:	<input type="text" value="0"/>	Strike:	<input type="text" value="0"/>
Full-time Percentage:	<input type="text" value="050.00"/>	Other Days:	<input type="text" value="0"/>
		Session:	<input type="text" value="AM"/>
		Instructional Minutes in Day:	<input type="text" value="20"/>
		Total Lost Minutes:	<input type="text" value="0"/>
		Days In Session:	<input type="text" value="200"/>



# PIMS Child Acct EOY

## Inserting & Updating Time Summaries, continued

### Review the Data for the following Fields:

- Verify: Calendar Program (verify a non-reimbursable entry exists for any non-state approved time summaries)
  - Populated based on the time summary session:  
AM/PM Semester About; A1, A2.....P1, P2.....CTE=PT  
FD = CTE-FD  
FT = CTE-FT
- Verify: Rotation Pattern – (**Required** only for Half Day & Semester, leave blank otherwise)
  - Populated based on the time summary session:  
FD and Semester About = S  
AM/PM Semester About; A1, A2.....P1, P2..... = H  
FD/FT = blank
- Verify: Instructional Hours/Minutes in Day: this information will be populated from your School Schedule  
Instructional Time Hours/Minutes
- Manually Enter: Total Lost Hours/Minutes: manually enter any lost hours/minutes
- Verify: Full-Time Percentage: this percentage is populated based on the time summary Session
  - AM/PM session = 50%
  - A2, A2, A3.....P1, P2, P3..... = 25%
  - FD/FT = 100%
- Click **“Save”**

Repeat the procedures for each time schedule and location

Time Summaries labeled as **‘Special’** are School Schedules that are marked as not being offered Monday thru Friday and are processed as Special Time Summaries



# PIMS Child Acct EOY



## Inserting & Updating Time Summaries, continued

Harris Career and Technical Center  
2018-2019 School Year

Time Summaries

Good Morning Mrs. Mottau

1 AM	2 Hrs	20 Minutes
2 AM	2 Hrs	40 Minutes
3 AM	2 Hrs	35 Minutes
4 PM	2 Hrs	45 Minutes
5 FD	6 Hrs	20 Minutes

System Rollover:  True  False

# 1 AM 2 Hrs 20 Minutes

Time Summary | Procedures | School/Student Associations | Student/ School Association

1 AM 2 Hrs 20 Minutes

Calendar Program: CTC/AVTS part-time program

Rotation Pattern: Half day

Graduation Date: 05/30/2019

Calendar Start Date: 08/21/2018

Calendar End Date: 06/04/2019

Instruction Start Date: 08/27/2018

Instruction End Date: 05/30/2019

# Scheduled Days: 200 Act 80 Days: 1 Act 80 Group: 149385923679 Other Days: 0

Makeup Days: 0 Days Added: 0 Strike: 0 Session: AM

Instructional Hours in Day: 2 Instructional Minutes in Day: 20

Total Lost Hours: 0 Total Lost Minutes: 0

Full-time Percentage: 050.00

Days In Session: 200

Active  Inactive



# PIMS Child Acct EOY

## Resetting School Schedule Summaries

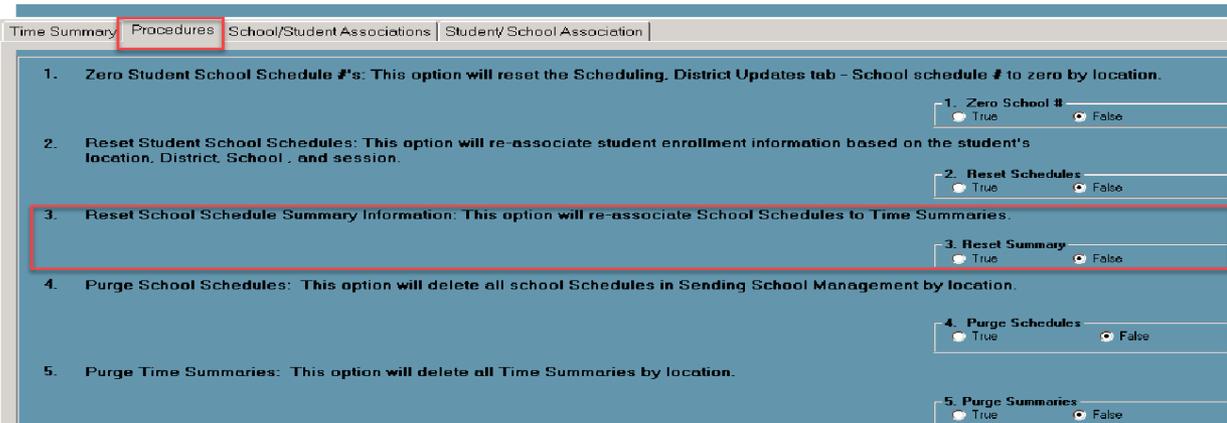
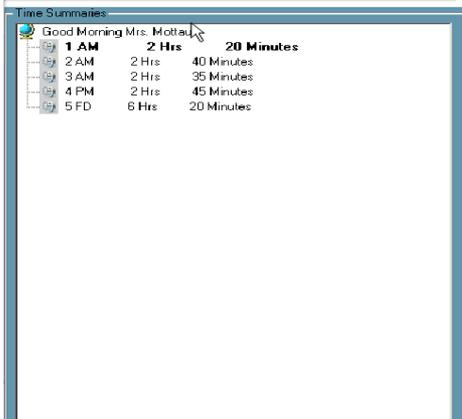
Re-assigns school schedules to the appropriate Time Summary by automatically linking Time Summaries and School Schedules.

During the Insert Time Summary process the School Schedules are linked to the Unique Time Summary just created. However, it is best practice to verify all School Schedules have properly been linked to a Time Summary in Sending School Management > School Schedule tab – Instructional Time Summary dropdown.

**If you need to Reset you can do so on the Procedures tab in Instructional Time Summary module**

Perform this step **AFTER** Time Summaries have been inserted/updated.

1. Click Procedures tab.
2. Select Location (if applicable)
3. #3 Reset School Schedule Summary Information > select True
4. Click OK when “Process Complete” appears.



If your school has multiple locations, repeat as necessary for each location.



# PIMS Child Acct EOY

## Verify School Schedules to Time Summaries Links

### Go to Modules > District Billing > Instructional Time Summary

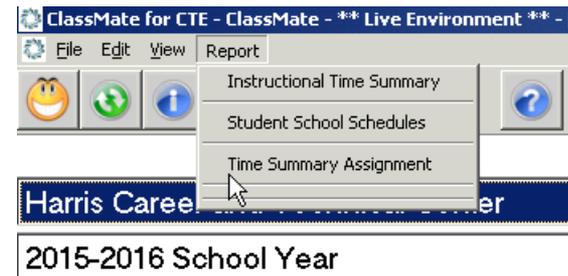
Click on Reports located on the top tool bar.

Select the Time Summary Assignment report.

**Note:** If the Report does not appear on top tool bar the report can be accessed by closing the module, going to Reports > District Billing > Time Summary Assignment report. If you do not see this report, please contact your System Administrator and request that the report be assigned to you.

Review this report and verify that the Sending Schools are showing linked to the correct School Schedule & Time Summary.

If there are any Sending Schools not showing the correct linkage between School Schedule & Time Summary you will need to correct the linkage in the Sending School Management Module.

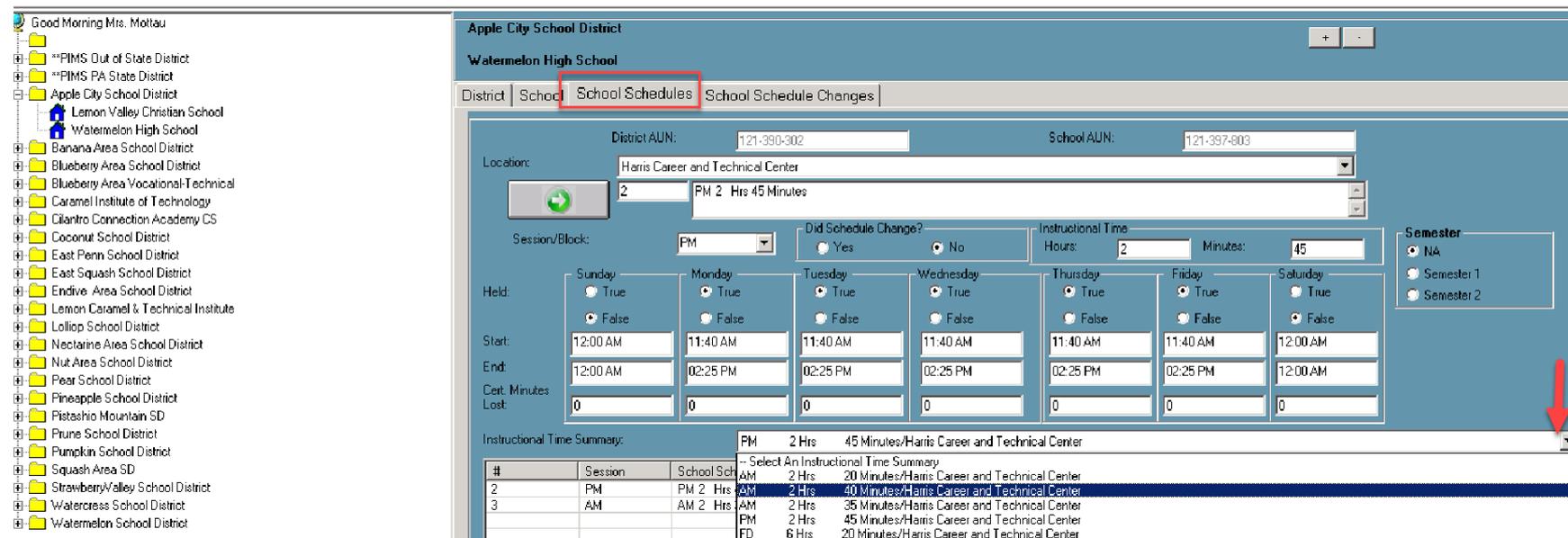


# PIMS Child Acct EOY

## Correcting School Schedules to Time Summaries Links

Modules > Base Data > Sending School Management

1. Click a District.
2. Click a School.
3. Click the School Schedules tab.
4. Click on a Schedule to select.
5. Check that the dropdown shows the correct linkage to the Instructional Time Summary.
6. If it does not, click the dropdown and select the appropriate Instructional Time Summary.
7. Click Save



Apple City School District  
Watermelon High School

District | School | **School Schedules** | School Schedule Changes

District AUN: 121-390-302 School AUN: 121-397-903

Location: Harris Career and Technical Center

2 PM 2 Hrs 45 Minutes

Session/Block: PM Did Schedule Change?  Yes  No Instructional Time Hours: 2 Minutes: 45

Semester  NA  Semester 1  Semester 2

Hold:	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input checked="" type="radio"/> True							
<input type="radio"/> False							
Start:	12:00 AM	11:40 AM	12:00 AM				
End:	12:00 AM	02:25 PM	12:00 AM				
Cat. Minutes Lost:	0	0	0	0	0	0	0

Instructional Time Summary: PM 2 Hrs 45 Minutes/Harris Career and Technical Center

#	Session	School Sch	Summary
			-- Select An Instructional Time Summary
2	PM	PM 2 Hrs	AM 2 Hrs 20 Minutes/Harris Career and Technical Center
3	AM	AM 2 Hrs	AM 2 Hrs 40 Minutes/Harris Career and Technical Center
			AM 2 Hrs 35 Minutes/Harris Career and Technical Center
			PM 2 Hrs 45 Minutes/Harris Career and Technical Center
			FD 6 Hrs 20 Minutes/Harris Career and Technical Center

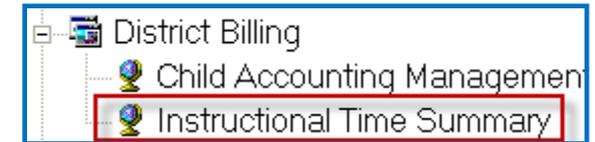


# PIMS Child Acct EOY

## School/Student Associations tab

Displays the school schedules for selection. When selected, lists the students currently associated with that school schedule, which allows you to view which school is assigned to which Time Summary and which students are assigned to the School Schedule by performing the following:

- 1) Click on a Time Summary
- 2) Click the School/Student Associations tab
- 3) Click on a School Schedule



Harris Career and Technical Center

2018-2019 School Year

**System Rollover**

True  False

# 3 AM 2 Hrs 35 Minutes

+

-

Time Summary | Procedures | **School/Student Associations** | Student/School Association

#	Session	District	School	Locati	Student	Prgm#	First	Last	Passcode
1	AM	SAS	Colonial Nectarine I.U.#20	00000	000012350	1	Lillian	Atkins	44442356
1	AM	BASD	Banana Area Senior High School	00000	000012613	4	Christian	Atkins	44446508
1	AM	EASD	Centennial	00000	000012613	5	Christian	Atkins	44446508
1	AM	NASD	Centennial School	00000	000012289	5	Breyden	Banach	44445421
					000012352	1	Alyssa	Banach	44441541
					000012563	1	Christian	Banach	44449425
					000012573	1	Jonathan	Banach	44442934
					000012643	1	Frank	Banach	44445135
					000013086	1	Justin	Banach	44448847
					000013124	1	Reven	Banach	44441139
					000013124	4	Reven	Banach	44441139
					000013144	1	Jeys	Banach	44447681
					000013145	1	Therion	Banach	44443612
					000012644	1	Robert	Carroll	44449678



# PIMS Child Acct EOY

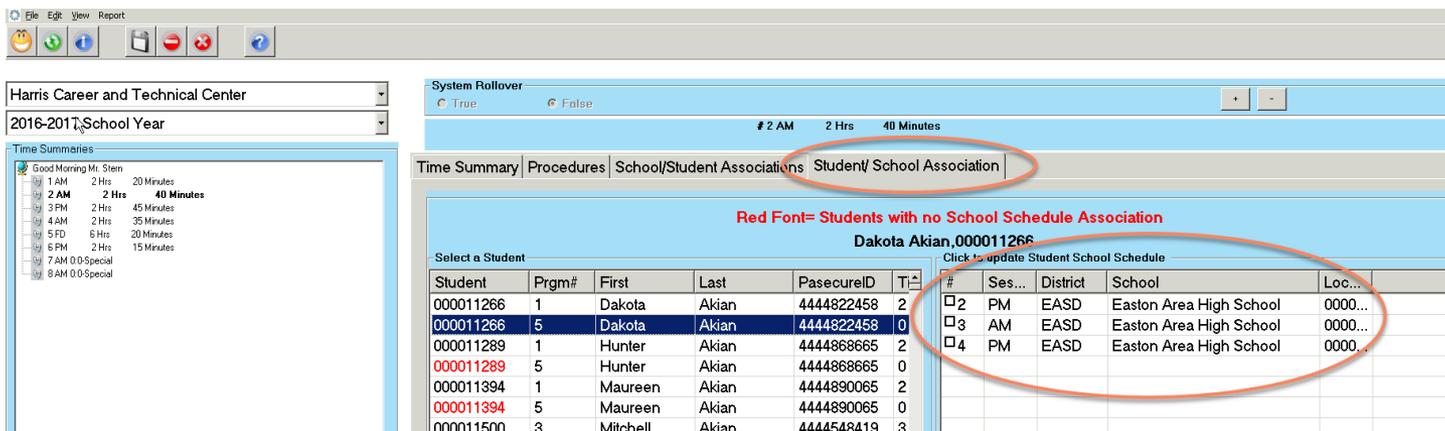
## Student/School Association tab:

Displays listing of students and their school schedule association. Students in black font have been associated to the school schedule displayed in the Time Schedule column.

***On this tab the user can perform the following:***

- Identify which students do not have a school schedule association assigned in Student Scheduling – District Updates tab. These students display in **RED**.
- Clicking on the student row in **RED** will display, to the right in the School Schedule window, the available school schedules based on the defined criteria. Clicking the School Schedule will automatically associate the Student to the selected school schedule # by updating Student Scheduling > District Updates tab > School Schedule field.

**\*\* The primary function for this tab is for PIMS administrators who are left to process PIMS Child Accounting information after the Student Services staff has left for the summer and they do not know how or where to update student schedules.**



**Red Font= Students with no School Schedule Association**

**Dakota Akian, 000011266**

Student	Prgm#	First	Last	PsecureID	T
000011266	1	Dakota	Akian	4444822458	2
000011266	5	Dakota	Akian	4444822458	0
000011289	1	Hunter	Akian	4444868665	2
000011289	5	Hunter	Akian	4444868665	0
000011394	1	Maureen	Akian	4444890065	2
000011394	5	Maureen	Akian	4444890065	0
000011500	3	Mitchell	Akian	4444548419	3

#	Ses...	District	School	Loc...
<input type="checkbox"/> 2	PM	EASD	Easton Area High School	0000...
<input type="checkbox"/> 3	AM	EASD	Easton Area High School	0000...
<input type="checkbox"/> 4	PM	EASD	Easton Area High School	0000...



# PIMS Child Acct EOY



## Recommended Reports

### School Calendar Information

**School Calendar List** - Review scheduled days for accuracy

### District Billing

**Instructional Time Summary** - Review Time Summary data

**Time Summary Assignment** - Review Schools associated with Time Summary

**Student School Schedules** - Review students linked to school schedule number

**\*\*Note:** Students are not linked to the Time Summary Number. If there are students who are not linked to the proper School Schedule Number those students will need to be manually adjusted in Student Scheduling / District Updates tab.

**\*\* Must export PIMS templates before generating the following reports\*\***

### PIMS Management

**Alpha Student Calendar Fact**

**PIMS Student Calendar Fact Summary**

**PIMS School Calendar**

**Current Yr – School Calendar Report**



# PIMS Child Acct EOY

## Child Accounting Reports

### Reports > District Billing > Enrollment Membership Summary

On this report review/validate district data, look for discrepancies of membership that exceed your total days in session and Blank Districts

### Reports > PIMS Management > PIMS ADM Summary

**\*\*\*Note: Before running these reports you MUST export the PIMS School Calendar & PIMS Student Calendar Fact templates**

Compare the PIMS ADM Summary report to the Enrollment Membership Summary report.

Look at all data including membership entries and totals. Make sure no students are missing. Make sure that the data matches.

Clients should review student discrepancies individually, checking schedule begin dates and end dates, checking to see if the Student is linked correctly for PIMS, etc.

Discrepancies that cannot be corrected should be sent to the Help Desk for assistance.



# PIMS Child Acct EOY

## PIMS Export Management-NEW – Adding a Submission Date

**Location:** Modules > PIMS Management > **PIMS Export Management – NEW (\*\*NEW MODULE\*\*)**

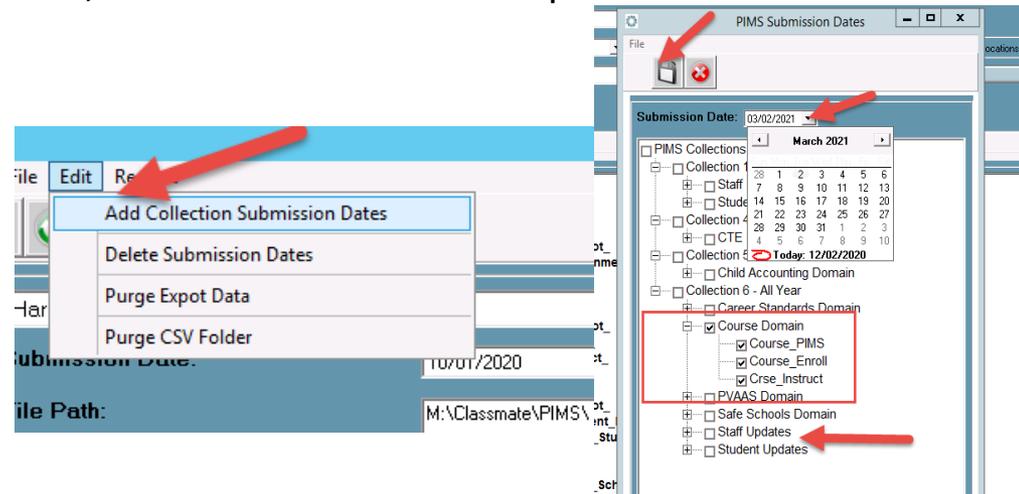
NEW module added 2021SY – please assign using User Module Management if you currently do not have & remove former PIMS Export Management module as this will no longer be updated.

Before exporting your templates for each submission you need to first add the Snapshot/Submission Date.

Also If you receive the error, “Invalid submission date for template” when processing update the submission date as follows:

1. Click Edit > Add Collection Submission Dates from top of module
2. Click the dropdown and select the desired Submission date.
3. Check the desired (required) Collection, Domain or individual templates for the submission.
4. Click Save to update.

**Note:** We recommend actual valid PIMS Submission Dates should be entered.



# PIMS Child Acct EOY

## PIMS Export Management-NEW

**Location:** Modules > PIMS Management > **PIMS Export Management-NEW**

1. Select the correct location from the top dropdown.
2. Select the correct submission date. If the correct submission date does not appear in the dropdown, or if you receive an error, “Invalid submission date for template” when you click Save in Step 5 below, review the previous slides for **PIMS Export Management – Adding a Submission Date**.
3. Check the boxes for the Collection, Domain or Individual templates that are due:  
**PIMS\_School\_Calendar**  
**PIMS\_Student\_Calendar\_Fact**  
\* Include Student and School Enrollment to satisfy template dependencies
4. If you want the file headers included on your export files check the Include Header box.  
If you export your files with the headers included, on the PIMS Site when you upload the files you will need to check the boxes for each file stating that your files include headers.
5. To export the files click Save (floppy disk icon)

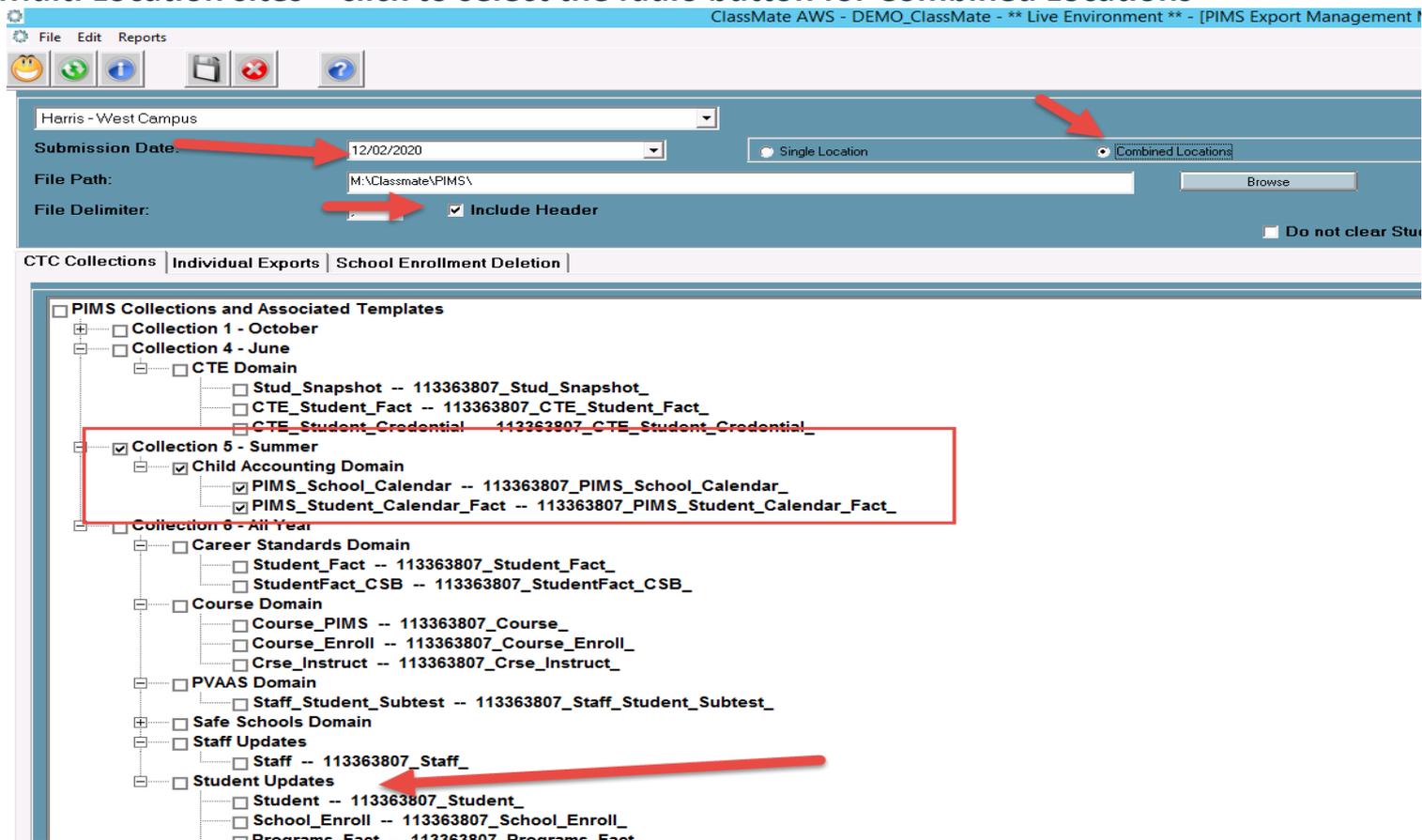


# PIMS Child Acct EOY

## PIMS Export Management-NEW

Location: Modules > PIMS Management > **PIMS Export Management - NEW**

**\*\* Multi Location sites – click to select the radio button for Combined Locations \*\***



ClassMate AWS - DEMO\_ClassMate - \*\* Live Environment \*\* - [PIMS Export Management]

File Edit Reports

Harris - West Campus

Submission Date: 12/02/2020

Single Location Combined Locations

File Path: M:\Classmate\PIMS\ Browse

File Delimiter:  Include Header

Do not clear Stu

CTC Collections | Individual Exports | School Enrollment Deletion

PIMS Collections and Associated Templates

- Collection 1 - October
- Collection 4 - June
  - CTE Domain
    - Stud\_Snapshot -- 113363807\_Stud\_Snapshot\_
    - CTE\_Student\_Fact -- 113363807\_CTE\_Student\_Fact\_
    - CTE\_Student\_Credential -- 113363807\_CTE\_Student\_Credential\_
  - Collection 5 - Summer
    - Child Accounting Domain
      - PIMS\_School\_Calendar -- 113363807\_PIMS\_School\_Calendar\_
      - PIMS\_Student\_Calendar\_Fact -- 113363807\_PIMS\_Student\_Calendar\_Fact\_
  - Collection 6 - All Year
    - Career Standards Domain
      - Student\_Fact -- 113363807\_Student\_Fact\_
      - StudentFact\_CSB -- 113363807\_StudentFact\_CSB\_
    - Course Domain
      - Course\_PIMS -- 113363807\_Course\_
      - Course\_Enroll -- 113363807\_Course\_Enroll\_
      - Crse\_Instruct -- 113363807\_Crse\_Instruct\_
    - PVAAS Domain
      - Staff\_Student\_Subtest -- 113363807\_Staff\_Student\_Subtest\_
    - Safe Schools Domain
    - Staff Updates
      - Staff -- 113363807\_Staff\_
    - Student Updates
      - Student -- 113363807\_Student\_
      - School\_Enroll -- 113363807\_School\_Enroll\_
      - Programs\_Fact -- 113363807\_Programs\_Fact\_

# PIMS Child Acct EOY

## Multi-Location Clients: Special Instructions

**After you export your files for the first location, and have completed validations including re-exporting as needed and are ready to submit to PDE:**

- Go to PIMS & upload the files for that location.
- Once files for that location are successfully uploaded, move those out of the M:\ClassMate\PIMS folder.
- It is recommended that you move the export files to a special folder\subfolder you create, such as “M:\PIMS Course Instructor Submission (date)\Location One” for future reference.
- Click the drop down next to the location name.
- Select the next site.
- Then check the template boxes again.
- If you want the file headers included on check the “Include Header” box.
- Click Save icon. Repeat steps for each location.



# PIMS Child Acct EOY

## Time Change \* Special Circumstance

### During the School Year

Once the School schedules have been created, inserted, updated and saved ClassMate does allow for changes to the schedule while the school year is in session.

### Getting Started

Double Click **Modules** > Double click **Base Data Information** >  
Click **Sending School Management** > **School Schedules Tab**



### Time Change Example

School A's AM students have been attending the CTC for the first 90 days of school at 8:00AM until 10:45 AM which is 2 hours & 45 minutes of instructional time.

Now School A has informed the CTC that these same AM students will now be coming at 8:30AM until 10:45AM which is 2 hours & 15 minutes instructional time for the last 90 days of the school year.

At the end of the process, you may have multiple time changes for one schedule, but they must add up to the full number of school days in the year.



# PIMS Child Acct EOY

## Time Change\* Special Circumstance, continued

Creating a Time Change: Part One – Mark Schedule as Changed on School Schedules tab:

1. Select the school.
  2. Select the School Schedule that requires the Time Change.
  3. Click “Yes” for Did Schedule Change?
  4. Click Save.
- School schedules that change within the school year, need to be reported with an hour/minute average.
  - For each date range during the school year, enter the hours and minute intervals for the selected School Schedule that changes.
  - Recalc Average: Click to calculate the Average hours/minutes
  - The Average Hours and Minutes will be reported NOT the original Instructional Hours/Minutes

District | School | School Schedules | School Schedule Changes

District AUN: 121-390-302 School AUN: 121-397-803

Location: Harris Career and Technical Center

3 AM 2 Hrs 35 Minutes

Session/Block: AM

Did Schedule Change?  Yes  No

Instructional Time Hours: 2 Minutes: 35

Semester  NA  Semester 1  Semester 2

Held:	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<input type="radio"/> True	<input type="radio"/> True	<input type="radio"/> True	<input type="radio"/> True	<input type="radio"/> True	<input type="radio"/> True	<input type="radio"/> True	<input type="radio"/> True
<input checked="" type="radio"/> False	<input checked="" type="radio"/> False						
Start:	12:00 AM	07:50 AM	12:00 AM				
End:	12:00 AM	10:25 AM	12:00 AM				
Cert. Minutes Lost:	0	0	0	0	0	0	0

Instructional Time Summary: AM 2 Hrs 35 Minutes/Harris Career and Technical Center

#	Session	School Schedule	Location	Semester
2	PM	PM 2 Hrs 45 Minutes	Harris Career and Technical Center	0
3	AM	AM 2 Hrs 35 Minutes	Harris Career and Technical Center	0



# PIMS Child Acct EOY

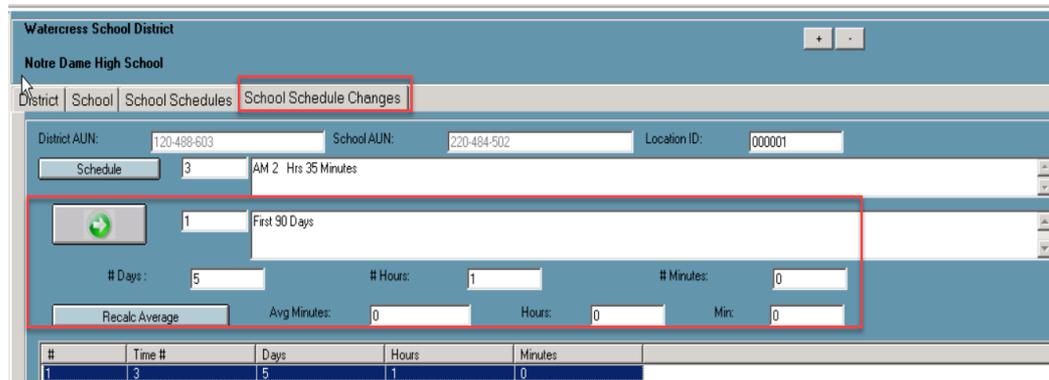
## Time Change\* Special Circumstance, continued.

Time Change Part Two: Creating the Original Schedule in School Schedule Changes Tab.

1. Click the School Schedule Changes Tab.
2. Click the Green Next Number button.
3. Enter a Time Change Name for the original School Schedule time – This will be the initial schedule.
  - ClassMate best practice is to use the number of days. Example: “**First 90 days.**”
4. Enter the # of Days in the # of Days box (example: 90)
5. Enter the # of Hours in the # of Hours box (example: 1)
6. Enter the # of Minutes in the # of Minutes box (example: 10)
7. Click Save.
8. When all time changes have been entered , user must click the **Recalc Average** button so that all the time change hours and minutes can be averaged in to 1 average Hours and minutes time summary.



**Note:** Remember that this info is for the *original* schedule. In the next step we will enter the data for the changed schedule.



#	Time #	Days	Hours	Minutes
1	3	5	1	0



# PIMS Child Acct EOY

## Time Change\* Special Circumstance, continued.

### Time Change Part Three: Creating the New Schedule in School Schedule Changes Tab.

1. Click the School Schedule Changes Tab if not already selected.
2. Click the Green Next Number button.
3. Enter a Time Change Name for the new School Schedule time – this will be the new schedule.
  - ClassMate best practice is to use the number of days. Example: **“Next 90 days.”**
4. Enter the new # of Days in the # of Days box (example: 90)
5. Enter the new # of Hours in the # of Hours box (example: 2)
6. Enter the new # of Minutes in the # of Minutes box (example: 5)
7. Click Save.



**Note:** If during the school year the schedule changes yet again, such as back to the original time, a 3<sup>rd</sup> Time Changes schedule must be created with that information.

Watercross School District

Notre Dame High School

District | School | School Schedules | **School Schedule Changes**

District AUN: 120-488-603 School AUN: 220-484-502 Location ID: 000001

Schedule 3 AM 2 Hrs 35 Minutes

**+** 2 Next 90 Days

# Days: 10 # Hours: 2 # Minutes: 5

Recalc Average Avg Minutes: 0 Hours: 0 Min: 0

#	Time #	Days	Hours	Minutes
1	3	5	1	0
2	3	10	2	5



# ClassMate

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Questions? Contact us!  
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