

## PIMS Staff Submission Overview

October 2022

### ➤ Collection 1 – October – C1 Oct Staff Submission Required Templates

- Staff
- Staff Snapshot (10/01/xxxx)
- Staff Assignment
- District Fact

### ➤ Modules Required:

- **Personnel Management > Employee Management**
- **Personnel Management > Security Personnel Qualifications**
- **PIMS Management > PIMS Export Manger - NEW: (new module added 2021 SY – please assign using User Module Management if you currently do not have & remove the former PIMS Export Management module as this will no longer be updated)**
  - Adding Snapshot Dates:
    - For each Collection, enter Template Submission dates, usually it will be the collection date.
    - Click Edit – Add Snapshot/Submission Dates
    - Select the appropriate Snapshot/Submission date
    - Click all templates due for that Collection and Save.
    - To include Headers in the export file, click “Include Headers” prior to exporting.
    - For Multi Locations, click the Combined Locations prior to exporting selected templates to combine all locations into one upload file or select each location to process individually. For some files, you cannot upload as individual locations and must export only as combined.
    - Prior to exporting, always select the appropriate Submission date for that specific Collection
    - Select the appropriate Collection, Domain and/or Templates, and Save to process export
    - Since the Terminated staff will have a current year PIMS assignment, the Staff will be included in the Staff and Staff Snapshot export; however, the Staff will not be included in the Staff Assignment export which includes only current Staff.

### ➤ Staff:

- **Required ClassMate data when HR submits your Staff templates:**
  - Employee’s Name: First and Last
  - Employee’s City and state
  - Employee’s Professional Personnel ID
  - Employee Management > PIMS tab - ESPP must be set to Yes
- **Reporting Terminated Staff who were terminated October thru June of prior yr :**
  - In Employee management > PIMS tab enter:
    - a terminated employment status
    - a termination reason

## PIMS Staff Submission Overview

- the actual termination date
  - Do not remove the salary, the export process will export \$0
- In PIMS Export Management-NEW > Export the Staff, Staff Snapshot, and Staff Assignment
- In PIMS Export Management-NEW > Individual Export tab,
  - select terminated employees
  - Select Staff and Staff Snapshot Templates
  - Click 1. Create Export Data
  - Click 2. Create Export Files- your terminated staff will be appended to your current Staff /Staff Snapshot files.
  - Terminated employees are not reported in Staff Assignment
  - Only report terminated employees once
- **Reporting Terminated Staff who were terminated after July 01 of current year :**
  - In Employee management-NEW > PIMS tab enter:
    - a terminated employment status
    - a termination reason
    - the actual termination date
    - Do not remove the salary, the export process will export \$0
    - PIMS Assignment tab, enter the actual assignment termination end date

### ➤ Staff template:

- **Field Association:**
  - **#2 PPID:** populated from Employee Management > General Tab – State PPID
    - For school security personnel who have a PPID, report the PPID, for school security personnel without a PPID, use the 5- or 6-digit Municipal Police Officer Training ID (MPTID) preceded by SS; or if the school security personnel does not have an MPTID, the LEA must assign the individual a unique and consistent 5- or 6-digit ID preceded by SS
    - Example: • 6925031 or • SS123456 (for school security staff without a PPID)
  - **#8 Job Description:** populated from Employee Management > PIMS Tab - State job Description
  - **#14 School Number:** populated from Employee Management > PIMS Tab – Primary Location.
    - ALL LEA & School numbers can be found on the EdNA website
    - 9999 - Unassigned Generic Location assign to Off Site LEAs
    - XXXX – Site location assign to teachers
  - **#17 Staff Employment Type Code:** populated from Employee Management > PIMS Tab -Employment Type
  - **#20 Gender:** populated from Employee Management > General Tab – Gender
  - **#21 Race/Ethnicity:** populated from Employee Management > General Tab – Ethnicity
  - **#23 Home Phone:** populated from Employee Management > General Tab – Home Number
  - **#25 Address 1:** populated from Employee Management > General Tab – Address 1
  - **#26 Address 2:** populated from Employee Management > General Tab – Address2

## PIMS Staff Submission Overview

- **#27 City:** populated from Employee Management > General Tab – City
- **#28 State:** populated from Employee Management > General Tab – State
- **#29 Zip:** populated from Employee Management > General Tab – Zip Code
- **#35 Current Service Date:** populated from Employee Management > PIMS Tab – Initial Hire Date
- **# 36 Exit Date:** populated from Employee Management > PIMS Tab – Termination Date
- **#39 Years Experience:** populated from Employee Management > PIMS Tab – Years Experience
- **#40 Birth Date:** populated from Employee Management > General Tab – Birthdate
- **#41 Active/Inactive Indicator:** populated from Employee Management > PIMS Tab – Employment Status
- **#43 Years Experience In District:** populated from Employee Management > PIMS Tab – Years In District
  - The export process will re-calculate the years experience in District for all Staff with **blank** values in field #43. Calculation used for hires and re-hires.
  - Calculation formula must be consecutive years.
    - The years are counted by school year. July 1, XXXX to June 30, xxx1
    - Do not give credit if terminated prior to July 1<sup>st</sup>.
    - During Rollover, years experience in district is incremented for All Active Staff with an Active Assignment
- **#44 Job Class Code Long:** populated from Employee Management > PIMS Tab – Employment Classification
  - If no selection made, employee will export as *OE-Other Employee*
- **#48 Staff Qualification Status Code:** populated from Employee Management > PIMS Tab – Staff Qualification Status
- **#52 Annual Salary:** populated from Employee Management > Positions Tab – Annual Salary
- **#54 Termination Code:** populated from Employee Management > PIMS Tab – Termination Reason
- **#57 Alternate Staff ID:** populated from Employee Management - Local Employee ID
- **#63 Local Contract:** populated from Employee Management > PIMS Tab – Local Contract Yes/No
- **#65 First Name:** populated from Employee Management > General tab – First Name
- **#66 Last Name:** populated from Employee Management > General tab – Last Name
- **#67 Name Suffix:** populated from Employee Management > General tab – Name Suffix
- **#71 Highest Degree Institution Code:** populated from Employee Management > PIMS Tab – Highest Degree Institution
- **#73 Address 3:** populated from Employee Management > General tab – Address 3
- **#76 Email Address:** populated from Employee Management > General tab – Email Address
- **#77 Middle Name:** populated from Employee Management > PIMS tab – Middle Name
- **#83 Employment Eligibility Verification:** populated from Employee Management > PIMS Tab – Employment Verification

## PIMS Staff Submission Overview

- **#95 Authorized to Carry Weapon Indicator:** populated from Employee Management > PIMS Tab – Authorized to Carry a Weapon Yes/No
  - Required for school security personnel (School Police Officer, School Resource Officer, School Security Officer).
- **#116 Gender Identity:** populated from Employee Management > General Tab – Preferred Gender

### ➤ Staff Snapshot template:

Staff Snapshot is populated from the recently exported Staff data for all active employees.

- **#50 Snapshot Date:** populated with the PIMS export submission date at time of export.

### ➤ Staff Assignment template:

- **#2 PPID:** populated from Employee Management > General Tab – State PPID
  - For school security personnel who have a PPID, report the PPID, for school security personnel without a PPID, use the 5- or 6-digit Municipal Police Officer Training ID (MPTID) preceded by SS; or if the school security personnel does not have an MPTID, the LEA must assign the individual a unique and consistent 5- or 6-digit ID preceded by SS  
Example: • 6925031 or • SS123456 (for school security staff without a PPID)
- **#3 Assignment Code:** populated from Employee > PIMS Assignment Tab – Assignment code
- **#4 School Number:** populated from Employee > PIMS Assignment tab – Location
- **#5 School Year Date:** default date for SpringYYYY -06-30
- **#6 Assignment Date :** populated from Employee > PIMS Assignment Tab – Assignment Start Date
- **#7 Completion Date:** populated from Employee > PIMS Assignment Tab – Assignment End Date
- **#18 Percent Time Assigned:** populated from Employee > PIMS Assignment Tab – Time %
- **# 26 Primary Assignment Indicator:** populated from Employee > PIMS Assignment Tab – Primary Assignment Yes/No

## PIMS Staff Submission Overview

### ➤ Helpful Validations/Reports

- **Validations:**
  - **State Reporting > State Reporting Validations:**

*Prior to running the validations, you must export your templates. When correcting errors, always remember to re-export templates after you have made changes and before running validations or reports.*

    - **Staff: (if using ClassMate to report to PIMS)**
      - Blank Salary
      - No State PPID
      - No Assignment
      - Duplicate PPID/SSN
- **Reports:** If using ClassMate to report Staff
  - **Alpha Employee Assignment Report**
  - **Alpha Employee PIMS Report**
  - **Alpha Employee PIMS-Confidential**
  - **Current Yr Alpha Staff/Staff Assignment**
  - **Prior Yr Alpha Staff/Staff Assignment**