Managing Bulk Jobs

This document was originally by New Visions and DOE Affinity staff prior to 2015. It was updated by New Visions in January 2024



Overview

• Communication, roles and responsibilities

• Using Galaxy to Plan and Monitor

• Using EIS and PDPS Bulk Job Inquiry to monitor

Roles and Responsibilites

The principal (or APO)

- Should review with you the purpose of each bulk job, and its relationship to all per session and per diem activities in the school.
- Use the comment and program fields in Galaxy to facilitate that communication.

The secretary should

- Ask the Principal for the Program and Comment fields to be entered if they are not
- Charge bulk jobs appropriately according to their intended purpose
- Monitor bulk job expenditures monthly using the resources described in this document. It is your responsibility to prevent bulk jobs from going into deficit.
- Keep the principal/APO informed of expenditures on a monthly basis
- Communicate with staff working per session jobs about how and when timesheets should be submitted.

The Secretary's Role: Best Practices

• If you don't know, ask what each job on the Galaxy TO is for.

- What activity does the job support?
- What is the duration of the program?
- Which teachers/staff are working this activity?
- How many hours is each person approved to work?
- Who is the supervisor of each activity?
- Create a system for timely and accurate payrolls:
 - Timesheets are **pre-coded** with the correct job id and supervisor signature
 - Deadlines are communicated to staff
 - Timesheets are retained in separate folders for each activity/job
 - Keep a log of hours worked by job by person OR print out time entered after each pay period.

The Secretary's Role: Best Practices

- Keep your principal informed about expenditures
 - Give your principal monthly reports of bulk job expenditures either from Galaxy or PDPS
 - Advise your principal when funds are running low. Remember it is your job to try to prevent deficits.
 - Request monthly meetings to review expenditures.
- Keep your principal informed about late timesheet submissions, timesheets without enough information, and other issues that can cause delay or mischarging.

Using Galaxy to Review Bulk Jobs

Example of Good Use of Program Field

	Per Session							
	Title	Job Id	Assignment	Organization Category	Program	Commit.	Budget Amount	Allocation
•	Laboratory Specialist Per Se	GF34V	<u>Summer</u>	Summer Student	4.5	\$117	\$117	TL Summer School Share
0	Principal Per Session	GF5FW	Summer	Summer Student	<u>26</u>	\$1,099	\$1,141 w/o fringe \$1,140	TL Fair Student Funding I
0	School Psychologist - Per S	GG782	Professional Deve	Professional Dev	Asd Expansion	\$0	\$676	TL 09 C4E ASD
0	School Secretary - Per Sess	GG781	Clerical	After/Before Sch	Fall 20	\$0	\$616 w/o fringe \$517	PRIVATE GRANT 33
0	School Secretary - Per Sess	GERKV	Clerical	Pupil Personnel :	Peak 60	\$0	\$1,552	TL Children First Operatin
0	School Secretary - Per Sess	GFV9H	Clerical	Pupil Personnel :	40 Various	\$892	\$1,034	TL Fair Student Funding I
0	School Secretary Per Sessi	GF34W	Summer	Summer Student	<u>176 + 16</u>	\$4,864	\$4,981	TL Summer School Share
0	School Social Worker - Per	GG4LX	Counseling	Professional Dev	Jordana 25	\$316	\$1,128 w/o fringe \$1,127	TL ASD
0	Supervisor Per Session	GERKZ	Academic	After/Before Sch	<u>50</u>	\$0	\$2,196 w/o fringe \$2,195	TL Children First Operatin
0	Supervisor Per Session	GERL2	<u>Academic</u>	After/Before Sch	Cr Rec/Tutoing 50	\$0	w/o f \$2,196 95	Title I SWP
0	Supervisor Per Session	GFVTD	Academic	After/Before Sch	Computer Applications	\$0	\$1,305 w/o fringe \$1,098	VATEA
0	Supervisor Per Session	GFVTG	Academic	After/Before Sch	Media - Communicatio	<u>\$</u> 0	\$1,305 w/o fringe \$1,098	VATEA
0	Supervisor Per Session	GG78Ø	Academic	After/Before Sch	Fall 34	\$0	\$1,776 w/o fringe \$1,494	PRIVATE GRANT 33

Using Galaxy to Monitor Bulk Job Expenditures: **Fringes**

- To see available balances in Galaxy, remember that committed amounts exclude fringe benefits*. To determine the accurate balance, compare committed amounts (spent and pending) to budget amount <u>without</u> fringe.
- This only applies to jobs funded with reimbursable (not TL) allocation categories because fringe benefits for tax levy jobs are not recorded in the school's budget.



* Fringe Benefits: FICA, Health, Welfare, UIB, Pension

Using Galaxy to Monitor Bulk Job Expenditures

- When Galaxy does not display the committed (spent) amount on the screen, you can see the committed amount on the Details screen in Galaxy,
 - Left Click on the Strawberry icon on the left side of the screen for that job.
 - Select Details from the Menu
 - The amount budgeted, spent, and remaining appears on the bottom left (see next page)

it v	Item Details										
itec	Job ID:	GF34Y	Title:		BULK: SCHO	DOL AIDE	Person Nan	ne:			
ites	Program Reporting	761	Object Code:		(RAIDN) 031		Employee]	D: 0			
🎒 Ne	Sequence Number:	1	Line:		в		PRI (EIS ID):		bols 🕶 🌘	0
441	Effective Date:	07-01-2010	Galaxy Modi Status:	fcation	Final Appro	val	P-Number:			Access)	
Per	End Date:	06-30-2011	Last Transac	ction Type:	New Item		Designatio	n:		3)	
Unr Iter	EIS Status: Item No:	EIS Awaiting for HR Transaction 761	ATR Placeme	ent Type:	Single Fund	eu				Y 10306	
Ite	Item no.	701								_	
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00 11	Applicant Data : N	lo information available.									
	Fingerprint Status : N	lot taken.									
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Monitoring Bulk Jobs in EIS and PDPS

- To see the Year to Date expenditures in real time, run the following reports:
- EIS Use to see bulk job expenditures by job for all staff:
 12.4 Bulk Job Inquiry: Lists all bulk jobs for all staff. Does not reflect pending amounts
 - 12.2 **Inquiry of Charges Posted to Stars System:** Displays payroll including paid prep periods amounts for non pedagogues (school aides, family workers)
- TBNK Use to see which individuals were charged to which job:
 Function 09 Bulk Job Detail Inquiry: Displays individuals charged to each bulk job by pay period.
- PDPS Use to track expenditures including pending expenditures
 o2 Per Session Payroll: o2 Payroll Menu: o8 Bulk Job Inquiry: Displays Job Cost (budget), expenditures, pending expenditures and available balances for per session bulk jobs (pedagogues, administrators, secretaries, guidance counselor, and social workers)
 - o1 Per Diem Payroll: o2 Payroll Menu: 11 Bulk Job Inquiry: Displays Job Cost (budget), expenditures, <u>pending</u> expenditures and available balances for per diem bulk jobs, including F-status teachers.

EIS:12.4 Bulk Job Inquiry

USER: E 08/22 1	STAFFO L2:12	N.Y.C. P	UBLIC SCHOO BULI	DLS - EMPLOYEE K JOB INQUIRY	INFORMATION S	YSTEM EI1MU61 PAGE 1
RESPON	SIBLE DIS	STRICT:	<u>1</u> 1 TITI	_E:	FY: 07 S	CHOOL: X545
JOB ID	TITLE	ORG UN	QCK CD	JOB COST	EXPENDITURES	AVAILABLE
G5HX4	COOPN	11X!)34620	2746.00	0.00	2746.00
G5KI3	RAIDN	11X !)04601	5000.00	0.00	5000.00
G 5NWL	TRTRS	11X!)47029	19873.00	0.00	19873.00
G5QPI	GCGCS	11X!)46057	1345.00	0.00	1345.00
G5TCS	SUSUS	11X!)48029	2089.00	0.00	2089.00
G5TIA	TRTRS	11X!)04620	2469.60	0.00	2469.60
G5TU0	TRTRD	11X!)20802	12774.12	0.00	12774.12
G5YCQ	SUPLS	11X!)48029	10000.00	0.00	10000.00
G5YCS	CLSWS	11X!)34605	1046.00	0.00	1046.00
G59MB	TRTRD	11X!)04601	23360.00	2382.38	20977.62
G59MG	SYPLS	11XL	J04620	6167.00	251.55	5915.45

- Lists all of the bulk jobs within the school.
- Does not calculate the pending payroll.
- Provides a general overview of the school's bulk jobs.

EIS: 12.2 Inquiry of Charges posted to Stars

_ USER: ESTAFFO N.Y.C. PUBLIC SCHOO	LS - EMPL	OYEE INFORM	MATION SY	/STEM		EI1M491
08/22 14:22 INQUIRY OF CH	ARGES POS	TED TO STAF	RS DETAIL			PAGE 1
F			CH	IECK	Т	
PAYROLL Y FD QUICK OBJ LINE LOC	JOB NO	EIS/DOC N	NAME C	DATE	Ρ	\$AMNT
					-	
B 0D R 6 11 004601 031 6214 ¹⁰⁰⁰	G37ZF	000000 FI	IOR S 08	25 05	Ρ	731.36
B 01 R 6 11 004601 031 6214 ¹⁰⁰⁰	G37ZF		09	22 05	Ρ	1851.92
TOTAL FOR EIS ID ^{UU}	0000	SSN	0000000	000	\$	2,583.28
B 01 R 6 11 004601 031 6214 1000 00	637ZF	000000 AE	3RA B 09	22 05	Ρ	2257.62
TOTAL FOR EIS ID	0000	SSN	0000000	0000	\$	2,257.62
B 02 R 6 11 004601 031 6214	G37ZF	000000 FI	IOR S 10	06 05	Ρ	184.52
TOTAL FOR EIS ID	00000	SSN	0000000	000		\$184.52
B 02 R 6 11 004601 031 6214	G37ZF	000000 AE	3RA B 10	06 05	Ρ	284.76
B 03 R 6 11 004601 031 6214	G37ZF		10	20 05	Ρ	41.44
TOTAL FOR EIS ID ⁰	00000	000000	00000000	00		\$326.20
B 06 R 6 11 004601 047 6214 1000	G37ZF	1034049 Tl	JCK C 12	01 05	Ρ	195.85
TOTAL FOR EIS ID ⁰	00000	SSN	0000000	0000		\$195.85
	00					
TOTAL FOR SELECTION ===>	\$8,22	2.82				

 Displays per session, per diem and paid prep period amounts by check date for non pedagogues (school aides, family workers, paraprofessionals)

TBNK Function #9: Bulk Job Detail Inquiry

ES41C04			Ν.Υ.	C. D)EP1	OF EDUCAT	ION		E41M	1P04
08/22/06	14:30:1	8 PER	SESSION	BULK	JOE	B DETAIL IN	QUIRY SCREE	ΞN	E41₩	IS04
BULK JOB:		LOCATIO	DN:		FIL	E NO:	TOTAL	EXP	1322	20.83
FILE NO	NAME	LOC/ON	POS JE	HRS MI	(N C	CHECK DATE	СНЕСК АМТ Е	BUDL ()CKCD	OBJ
E	3LAKE		TRTRS	35	00	2006-08-16	1328.60	3002	07160	091
E	DAURIA		TRTRS	63	00	2006-08-16	2391.48	3002	07160	091
μ	JEAVER		TRTRS	2	30	2006-06-16	94.90	3002	07160	091
Μ	ITCHELL		TRTRS	103	30	2006-08-16	3928.86	3002	07160	091
F	LOURNOY		TRTRS	8	30	2006-06-16	322.66	3002	07160	091
F	LOURNOY		TRTRS	Θ	00	2006-06-16	2.18		00099	060
F	APPIAH		TRTRS	11	30	2006-06-16	436.54	3002	07160	091
F	APPIAH		TRTRS	Θ	00	2006-06-16	0.57		00099	060
Z	ZUNIGA		TRTRS	36	00	2006-08-16	1366.56	3002	07160	091
L	EVINE		TRTRS	36	10	2006-06-16	1372.87	3002	07160	091
L	EVINE		TRTRS	Θ	00	2006-06-16	1.69		00099	060
h	VILLIAMS		TRTRS	52	00	2006-08-16	1973.92	3002	07160	091

Displays individual pedagogues charged to each bulk job Provides a record of who worked against each job PDPS. Per Session. Payroll. Function #8 Per Session Bulk Job Inquiry

 USER: ESTAFF 08/22/2006	0 N.Y.C. BOARD 14:37	OF EDUCATION BULK JOB INQ	I - PER SES UIRY	SION SYSTEM	ES	5M001
LOCATION:	TIT	TLE:				
						REM
A JOB TITLE	LOC DESCRIPTI	ION (JOB COST	- EXPEND	- PEND EXP :	= AVAIL)	HHH: MM
G5JHP TRTRS		0000	000	000	000	
G5NWK TRTRS		0000	000	000	000	
G5NWL TRTRS	ACADEMIC	A 19873	000	000	19873	
G5QPI GCGCS	ACADEMIC	A 1345	000	000	1345	
G5TCS SUSUS	ACADEMIC	P 2089	000	000	2089	
G5TDW TRTRS		0000	000	000	000	
G5TIA TRTRS	ACADEMIC	A 2469	000	000	2469	
G5YCQ SUPLS	ACADEMIC	A 10000	000	000	10000	
G5YCS CLSWS	PARENT IN	NV 1046	000	000	1046	
G59MG SYPLS	CLERICAL	A 6167	251	140	5775	
G59ML TRTRS	ACADEMIC	A 0440	000	000	440	
G59MM SUPLS		0000	000	000	000	
G59MN TRTRS	ACADEMIC	A 20241	10989	2087	7163	
G59MO SUSUS		0000	000	000	000	

Displays job cost, expenditures, <u>pending expenditures</u> and available balances.

Check this screen to prevent problems before they happen

PDPS. Per Diem. Payroll. Function #11 :Per Diem Bulk Job Inquiry

LO	OCATIO	N: 11	X54	5	т	ITLE	;				
											REM
A	JOB	TITLE	Ľ	DC	DESCRIP	TION	(JOB COST	- EXPEND	PEND EXP	= AVAIL)	HHH: MM
	G5TU0	TRTRD	11	X5	INCE	CO	12774	000	000	12774	
	G59MB	TRTRD	11	X5	INCE	CO	23360	2382	000	20977	
	G59MF	TRTRD	11	X5			0000	000	000	000	

Displays job cost, expenditures, <u>pending expenditures</u> and available balances for Per Diem jobs including F Status jobs.