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

New Visions
for Public Schools

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	Summer	Summer Student	4.5	$117	$117	TL Summer School Share
🍅	▦	Principal Per Session	GF5FW	Summer	Summer Student	26	$1,099	$1,141 w/o fringe $1,140	TL Fair Student Funding H
🍅	▦	School Psychologist - Per S	GG782	Professional Deve	Professional Dev	Asd Expansion	$0	$676	TL 09 C4E ASD
🍅	▦	School Secretary - Per Sess	GG781	Clerical	After/Before Sch	Fall 20	$0	$616 w/o fringe $517	PRIVATE GRANT 33
🍅	▦	School Secretary - Per Sess	GERKV	Clerical	Pupil Personnel :	Peak _ 60	$0	$1,552	TL Children First Operatin
🍅	▦	School Secretary - Per Sess	GFV9H	Clerical	Pupil Personnel :	40 Various	$892	$1,034	TL Fair Student Funding H
🍅	▦	School Secretary Per Sessi	GF34W	Summer	Summer Student	176 + 16	$4,864	$4,981	TL Summer School Share
🍅	▦	School Social Worker - Per	GG4LX	Counseling	Professional Dev	Jordana 25	$316	$1,128 w/o fringe $1,127	TL ASD
🍅	▦	Supervisor Per Session	GERKZ	Academic	After/Before Sch	50	$0	$2,196 w/o fringe $2,195	TL Children First Operatin
🍅	▦	Supervisor Per Session	GERL2	Academic	After/Before Sch	Cr Rec/Tutoing 50	$0	$2,196	Title I SWP
🍅	▦	Supervisor Per Session	GFVTD	Academic	After/Before Sch	Computer Applications	$0	$1,305 w/o fringe $1,098	VATEA
🍅	▦	Supervisor Per Session	GFVTG	Academic	After/Before Sch	Media - Communicatio	$0	$1,305 w/o fringe $1,098	VATEA
🍅	▦	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.

| | | Teacher - Regular Grades - F | GF8NØ | Academic | | Summer Student | None | | $5,751 | $7,084 w/o fringe $5,960 | ROLLOVER TITLE I COR |

* 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)

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**
  - 02 Per Session Payroll: 02 Payroll Menu: 08 **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)

  - 01 Per Diem Payroll: 02 Payroll Menu: 11 **Bulk Job Inquiry**: Displays Job Cost (budget), expenditures, pending expenditures and available balances for per diem bulk jobs, including F-status teachers.

EIS:12.4 Bulk Job Inquiry

```
USER: ESTAFFO    N.Y.C. PUBLIC SCHOOLS - EMPLOYEE INFORMATION SYSTEM    EI1MU61
08/22 12:12                       BULK JOB INQUIRY                      PAGE  1

 RESPONSIBLE DISTRICT:  11     TITLE:           FY:   07    SCHOOL:   X545
                                                                      I000

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
G5NWL     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..    )04620       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

- 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                      N. Y. C.  DEPT OF EDUCATION            E41MP04
08/22/06    14:30:18   PER SESSION BULK JOB DETAIL INQUIRY SCREEN   E41MS04


 BULK JOB:        LOCATION:           FILE NO:        TOTAL EXP   13220.83


 FILE NO    NAME    LOC/ON   POS JE HRS MIN CHECK DATE CHECK AMT BUDL QCKCD   OBJ

            BLAKE            TRTRS      35 00 2006-08-16  1328.60 3002 07160   091
            DAURIA           TRTRS      63 00 2006-08-16  2391.48 3002 07160   091
            WEAVER           TRTRS       2 30 2006-06-16    94.90 3002 07160   091
            MITCHELL         TRTRS     103 30 2006-08-16  3928.86 3002 07160   091
            FLOURNOY         TRTRS       8 30 2006-06-16   322.66 3002 07160   091
            FLOURNOY         TRTRS       0 00 2006-06-16     2.18      00099   060
            APPIAH           TRTRS      11 30 2006-06-16   436.54 3002 07160   091
            APPIAH           TRTRS       0 00 2006-06-16     0.57      00099   060
            ZUNIGA           TRTRS      36 00 2006-08-16  1366.56 3002 07160   091
            LEVINE           TRTRS      36 10 2006-06-16  1372.87 3002 07160   091
            LEVINE           TRTRS       0 00 2006-06-16     1.69      00099   060
            WILLIAMS         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:  ESTAFFO   N.Y.C. BOARD OF EDUCATION - PER SESSION SYSTEM      ES5MO01
08/22/2006    14:37                BULK JOB INQUIRY


LOCATION:                    TITLE:
                                                                         REM
A JOB    TITLE  LOC    DESCRIPTION (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 INV    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

```
LOCATION:   11X545              TITLE:
                                                                    REM
A JOB    TITLE  LOC    DESCRIPTION (JOB COST - EXPEND - PEND EXP = AVAIL)  HHH:MM
_  G5TU0  TRTRD  11X5        NCE CO     12774       000       000      12774
   G59MB  TRTRD  11X5        NCE CO     23360      2382       000      20977
   G59MF  TRTRD  11X5                    0000       000       000        000
```

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