

# Pre-Training Activities

1. Examining the chart of accounts and documenting deviations from the state-mandated dimensions, values, etc.

- Run VALACT and clean up errors
- Inactivate any accounts that the district would not need to import. We will pull only active accounts.

2. Identifying or removing unused vendors

- Run DELVEN to get a report of delete-able vendors. There isn't a way to mass delete vendors but we can mass inactivate them so when the time comes we can pull only active vendors.

3. Identifying leave codes, their accrual rates, and maximum amounts

- You can pull a spreadsheet using Safari to pull in everyone's max accruals, balances, their specific accrual rate etc. You will want to use the BENEFIT\_BAL view.
- System Leave codes
  - AB – Absence
    - 2- SI - Sick
    - 3 - PL – Personal
    - 4 - VA – vacation
    - 5 - PR - Professional
    - 6 - HO- Holiday
    - 8 - MI – Military
    - 9 - JD – Jury Duty
    - 10 - CA – Calamity
    - 11 - DO – Dock
    - 15 - OT – Other
    - 16 - UN - Unknown
  - AT – Attendance
    - 1 - AT – attendance
    - 7 - SB – substituting
  - AD - Adjustment
    - 12 - OB - ODJFS adjustment
    - 14 - RE - Retirement adjustment
    - 17 - ET - EMIS attendance adjustment
    - 18 - EB - EMIS absence adjustment
  - AC – Accrual
    - 2 - SI - Sick
    - 3 - PL – Personal Leave
    - 4- VA- Vacation

4. Obtaining calendars and salary schedules for the go-live school year

- Run USPSDAT/CALRPT to get a listing of calendars. This report has different options that you can run to include all calendars or certain ones based on dates or particular calendar types.
- If using the system for salary schedules, SALRPT & select SALSCH to generate the salary schedule listing, if not bring printed salary schedule listing

5. Obtaining district tax ID numbers and ACH information

- USPSDAT/USPCON
- Run DEPRPT report. This report shows what we currently have entered in USPS for your ACH configuration. We may not need all of this information.

6. Reviewing deduction/benefit codes for old or unused ones, obtaining new year's rates (if applicable)

- Run USPSDAT/DNAMRPT