



PPMS and SMS

FTEF Calculation and Distribution for MIS Reporting

Center for Information Services
Supporting Washington State's community and Technical Colleges

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1 Overview

General Information

FTEF (Full Time Equivalent Faculty) is a term used by the SBCTC and the colleges to refer to faculty workload. The SBCTC defines FTEF as one instructional employee assigned to teach a full-time load of courses for nine months. The colleges define FTEF as a unit measurement representing the percentage of full-time workload (or effort) required for an instructor to teach a class. For example:

- Instructor Jones (FTEF of 100% in the Quarterly Staff Extract File) teaches four classes. Each of Instructor Jones's classes will be assigned an FTEF of 25%.
- Instructor Smith (also FTEF of 100% in the Quarterly Staff Extract File) teaches five classes. Each of Instructor Smith's classes will be assigned an FTEF of 20%.

Since FTEF is based on a calculation which combines both instructor and class records, the FTEF percentage can be different for different sections of the same class.

FTEF information is distributed to class records using one of the following methods:

- Running an automated FTEF Calculation and Distribution Process. When this process is run, the FTEF amounts from an instructor's payroll information in the Payroll/Personnel System (PPMS) are calculated and distributed to class records in the Student Management System (SMS) for the classes taught by that instructor for that quarter. This manual deals primarily with this method of FTEF calculation and distribution.
- Entering FTEF manually on the Class Schedule screen (IS1002)
- Using a pre-defined formula. This formula is used when the instructor has an employment status of 6 indicating he or she is a volunteer, has an ID of 999999999, and has no quarterly staff record.

The automated FTEF Calculation and Distribution Process consists of three major components:

- Job group PG800R (Quarterly Staff Extract). This process selects which employees in the Employee database should be reported to SBCTC for the quarter. It retrieves the employees' biographic, assignment, and salary data for that quarter's assignments and places the information in the Quarterly Staff Extract File. This file is then used in the FTEF Calculation and Distribution Process as the source of assignment data, including FTEF.
- MG001R (MIS 1/2 Reporting). This job group includes job SR2202J (FTEF Calculation and Distribution). SR2202J identifies each instructor's classes for the quarter and matches them to the assignment data for the instructor in the Quarterly Staff Extract File. Then it performs the FTEF calculation and distributes the amounts to class records.

As part of SR2202J, payroll records from the PPMS are matched and compared with class records in SMS. Historically, when this information was provided as Management Information System (MIS) reporting to the State Board, payroll information was referred to as MIS 6 and class information was referred to as MIS 2. Therefore, this matching process is referred to as the MIS 6/2 Match.

- MG003Q (MIS 1/2/6 Final Reporting). This job group includes job SR2212J (Final FTEF Calc/Distribution/ Reconciliation) which performs the final FTEF Calculation and Distribution so the colleges can provide the information to the SBCTC.

In order to reconcile data between the payroll records from PPMS and the class records from SMS and to correct all errors, you can run PG800R and MG001R as many times as necessary throughout the quarter.

FTEF Calculation and Distribution Process Steps

Following are the steps required to execute the FTEF Calculation and Distribution Process:

- 1 Run PG800R to create the Quarterly Staff Extract File.
- 2 Review all the extract reports from PG800R and correct invalid data in PPMS.
- 3 Run a report of class data by scheduling SR2201J in MG001R. This will generate the MIS 2 Report (SR2201).

- 4** Review the MIS 2 Report (SR2201) and correct invalid class data in SMS.
- 5** Periodically throughout the quarter, schedule SR2202J in MG001R to:
 - Calculate and distribute FTEF.
 - Identify error situations to correct.
 - Provide FTEF information used for in-house management reporting regarding the student-to-faculty ratio.
- 6** At the end of the quarter, run MG003Q for the final FTEF distribution and MIS reporting. For information on when to run MG003Q, go to the MIS Reporting Calendars web page on the web site for the State Board for Community and Technical Colleges (SBCTC), under For Colleges and SBCTC Staff, Data Services.

2 Understanding the Quarterly Staff Extract File

This section discusses the criteria by which employees are selected for inclusion in the Quarterly Staff Extract File; what data from the file is used in the FTEF Calculation and Distribution Process; and how to troubleshoot the results of the Quarterly Staff Extract File process.

Producing the Quarterly Staff Extract File

To create the Quarterly Staff Extract File, run the job group PG800R. PG800R selects employees for inclusion in the Quarterly Staff Extract File based on the following criteria:

- Employee status is active.
For a classified, exempt, or paraprofessional employee to be included in the Quarterly Staff Extract File, the employee assignment begin and end dates must encompass the beginning and ending dates of the year/quarter range specified when the extract process is run. However, for a faculty member to be included in the Quarterly Staff Extract File, the employee assignment begin and end dates may fall *within* the beginning and ending dates of the year/quarter range specified when the extract process is run.
- Employee status is separated but the separation date is after the end date of the year/quarter.
- Job begin date for the specific job is not greater than the ending date of the year/quarter (see note below).
- Job end date for the specific job is not less than the beginning date of the year/quarter (see note below).
- The appropriate quarter indicator on the employee's record is marked with an X. (This applies only to exempt, paraprofessional and faculty employees, not to classified employees.)
- The job status is active or leave-of-absence-with-pay.
- The job status is deleted, inactive, or leave-without-pay but the job status date falls after the end date of the year/quarter.

Note: For faculty, the job begin and end date criteria are recalculated to include one month before the quarter begins and one month after the quarter ends. This ensures that records for instructors with classes which start early or end late will be included.

Understanding Extract Data Used in FTEF Calculation and Distribution

Below is information regarding what data from the Quarterly Staff Extract File is used in the FTEF Calculation and Distribution Process. This section also discusses how the FTEF process handles multiple records for the same employee in the Quarterly Staff Extract File.

Understanding what Quarterly Staff Extract File information is used

The following records from the Quarterly Staff Extract File are excluded from the FTEF Calculation and Distribution Process:

- Students (Employee Type code S)
- Hourly staff (Employee Type code H)
- Volunteers (Employee Type code V)
- Supplement retirees (Employee Type code R)

Also, the FTEF Calculation and Distribution Process does not use all of the payroll data in the Quarterly Staff Extract file. The following paragraphs list the payroll data which is used:

Employee Type

Employee Type identifies the category of employment for an employee. The Employee Type code is entered on the Employee Status Screen (PS0001) for each employee. It should match the Employee Type code on the Job Class Table (PS9004) for each job assigned to the employee. If it doesn't match, the Employee Type code from the Job Class Table is used.

The following Employee Type codes from the Quarterly Staff Extract File are used in the FTEF Calculation and Distribution Process:

C	Classified
E	Exempt
F	Faculty
L	Paraprofessional
P	Part-time faculty

Employee ID

The employee's ID number identifies the individual in PPMS and in the Quarterly Staff Extract File.

Employment Status

The following employment status codes from the Quarterly Staff Extract File are used in the FTEF Calculation and Distribution Process:

- 1 Full-time employee - entered on the Employee Status screen (PS0001)
- 3 Part-time employee - entered on the Employee Status screen (PS0001)
- 7 Employee on sabbatical - entered on the Job Status screen (PS0002)
- 8 Employee on leave-with-pay - entered on the Job Status screen (PS0002)

Program Activity Classification Codes

The Program Activity Classification (PAC) code describes the kind of activity for which an employee is being paid. The code is taken from the program index (the fourth, fifth, and sixth digits of the account code) for each job an employee has.

An employee can be assigned an unlimited number of jobs and each job can have up to nine account codes. The Quarterly Staff Extract File process selects the account codes for a year/quarter based on the corresponding dates. Account codes with the same PAC code are added together (even if they are from different jobs).

The Quarterly Staff Extract File allows a maximum of six PAC codes for an employee's regular assignments and three PAC codes for an employee's moonlight assignments. If the employee has more than the nine PAC codes allowed by the Quarterly Staff Extract File, the Quarterly Staff Extract File process selects the first six regular and the first three moonlight PAC codes for the employee. A message indicating that an employee has too many regular or moonlight PAC codes is included in the Quarterly Staff Exception Report (CR6110A).

A job classification with a job category of M (moonlight) on the Job Class Table (PS9004) identifies additional or moonlight effort. PAC codes are included in the moonlight category for an employee when a moonlight job is assigned to that individual.

The Quarterly Staff Extract File process changes the first position of the PAC code to V (vocational) if the corresponding entry on the Program Index/Organization Table (GA1062) indicates that the program/organization index was funded with federal vocational money. The Program Index/Organization Table is part of the Financial Management System (FMS).

The following PAC codes show that the individual is being paid for teaching (direct instruction):

- 011 Direct instruction of a state-supported class.
- 014 Direct instruction of a self-supported class (community service).
- 111 Direct instruction of a contracted class.
- V11 Direct instruction of a state-supported class, but the instructor is being paid from federal vocational money.

FTEFs

The FTEF designates the percent of the instructor’s time assigned to an activity represented by the PAC code. The total percent of a full-time load is designated in PPMS for each job assigned to the instructor. The percentage can be allocated to instructional supervision, instructional research and development, or both, by entry of the related percent on the account code line on the Job Account Screen (PS0003) for that job.

The following PAC codes are included in the Quarterly Staff Extract File for an employee because percentages of each account are allocated to instructional supervision, instructional research and development, or both.

Account PAC Code	Supervision PAC Code	Research and Development PAC Code
011	012	013
014	015	015
111	112	113
V11	V12	V13

Understanding multiple records

It is possible for the Quarterly Staff Extract File to contain multiple records for the same employee. However, the FTEF Calculation and Distribution Process only recognizes multiple records for classified employees with part-time faculty assignments. It does not recognize multiple records for

full-time faculty, paraprofessional, or exempt employees. To ensure that all assignments for faculty are taken into account by the FTEF Calculation and Distribution Process, secondary assignments should be recorded as moonlight assignments, not as separate contracts.

The Quarterly Staff Exception Report (CR6110A) does not identify these multiple records as potential problems. The problem does not become apparent until the file is used in the FTEF Calculation and Distribution Process. If the individual's primary record is full-time faculty, exempt, or paraprofessional and the secondary record is part-time faculty assignment, the secondary records is bypassed in the FTEF Calculation and Distribution Process.

To counteract this condition, examine the Quarterly Staff Extract File Print Demographic Data report (CR6310A) carefully to identify all employees with more than one record in the Quarterly Staff Extract File. Multiple records are easier to identify if the report is sorted alphabetically by employee name.

Unless the individual's primary assignment is classified (Employee Type code C) and the additional assignment is part-time faculty (Employee Type code P), make necessary changes to the individual's payroll/personnel record to ensure accurate records on the Quarterly Staff Extract File and usable data for the FTEF Calculation and Distribution Process.

Understanding excluded records

The following records are not included in the Quarterly Staff Extract file, even though the individual had an active PPMS record for the specific year/quarter:

- Students (Employee Type code S)
- Hourly staff (Employee Type code H)
- Volunteers (Employee Type code V)
- Supplement retirees (Employee Type code R)
- Specific employees, if the government reporting exclusion field on the Personal Information Screen (PS0004) for the employee is marked with a Y (Yes).

Understanding employment status code combinations

Certain employment status code combinations are allowed in the class records for a specific instructor for the year/quarter. Although the FTEF Calculation and Distribution Process does not check for invalid combinations, classes with invalid employment status code combinations might fail to have FTEF assigned. The following combinations are valid:

An instructor with this code in one class...	Can only have these codes in other classes
1 (full-time)	1, 2, 5, 6
2 (moonlight)	1, 2, 4, 5, 6
3 (part-time)	3, 5, 6
4 (paraprofessional)	2, 4, 5, 6
5 (contracted out)	1, 2, 3, 4, 5, 6
6 (volunteer)	1, 2, 3, 4, 5, 6

Troubleshooting the Quarterly Staff Extract Process

Quarterly Staff Extract File problems are usually caused by the following types of errors:

- An employee's record was not selected because of incorrect coding or dates.
- An employee's record was selected but the coding in that record is inaccurate or incomplete.

The Quarterly Staff Exception Report (CR6110A) lists the employee ID, employee name, and the error condition encountered when the Quarterly Staff Extract File was created. An employee appears on the report for each error condition, even if the same error condition is encountered more than one time for the same employee.

Although specific error conditions are not noted on the following reports, the reports are invaluable when you are trying to determine the cause of an error condition in the FTEF Calculation and Distribution Process:

- Quarterly Staff Extract File Print - Demographic Data (CR6310A)
- Quarterly Staff Extract File Print - Assignment & Salary Data (CR6310B)

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3 Running the FTEF Calculation and Distribution Process

This section discusses:

- Tasks you need to perform before running the FTEF Calculation and Distribution Process (MG001R)
- Your options when deciding which class records to include when scheduling MG001R in the process
- Which records are deemed valid by the 6/2 Match process
- What occurs during the FTEF Calculation and Distribution Process

Performing Setup Tasks

Before running the FTEF Calculation and Distribution Process (MG001R), perform the following tasks:

- 1** Prepare the class records. (For detailed information on preparing the class records, see the Course Management User Guide maintained at your college.)
- 2** If the option to distribute FTEF based on credit equivalents has been chosen, run SR9202 in MG001R to calculate credit equivalents.
- 3** Make all necessary manual FTEF entries on class records using the Class Schedule screen (IS1002).
- 4** If changes have occurred in payroll/personnel records that affect records in the Quarterly Staff Extract File, run PG800R (Quarterly Staff Extract).

Setting the Scheduling Parameters for MG001R

Below are the MG001R options to consider when you are deciding which class records to include in the FTEF Calculation and Distribution Process.

Using the **CALC-RECON-OPT** parameter

Use the Calculation Reconciliation Option (CALC-RECON-OPT) parameter to identify which class records you want to include in the FTEF Calculation and Distribution Process. Enter one of the following:

- 01 Include all class records in the FTEF Calculation and Distribution Process; include classes with an MIS2 reject indicator.

This option assigns FTEF to classes that do not pass the appropriate error edits when SR2201J is run. Some of these might be classes with zero enrollment. This option is useful early in the quarter, before all necessary clean-up has occurred.

- 02 Include only those class records in the FTEF Calculation and Distribution Process that have passed the appropriate error edits and that have no MIS2 reject indicator.

- 03 Include only those class records in the FTEF Calculation and Distribution Process that have passed the appropriate error edits and have no MIS2 reject indicator; print a test reconciliation report showing the changes that will occur for all Quarterly Staff Extract File records or class records that do not pass the matching edit in the final MIS process. The reconciliation reports are the Quarterly Staff/Class Schedule Reconciliation Report (SR2904) and the FTEF Distribution & Computation Process Pre-Edit Error Report (SR2901A and SR2901B).

This option omits class records from the FTEF Calculation and Distribution Process when they have not passed the appropriate error edits. This option usually results in a more accurate distribution of FTEF because all class records showing no enrollment are excluded from the process.

Using the CALC-OPT parameter

Use the Calculation Options (CALC-OPT) parameter to identify how you want the FTEF calculated and distributed. Enter one of the following:

- A Calculate and distribute FTEF based on the credit equivalent for the classes.
- B Calculate and distribute FTEF based on the contact hours for the classes.

Understanding How the Process Works

The MIS 6/2 Match process

To be included in the FTEF Calculation and Distribution, a class record from SMS (MIS 2) must match a corresponding record from the Quarterly Staff Extract File from PPMS (MIS6). This matching is accomplished through the MIS 6/2 match process which is part of SR2202J. The FTEF for the instructor is then divided among the class records in the same funding source category, if any.

For a record to be considered a viable match, the following conditions must be met:

- The employee's identification number from the Quarterly Staff Extract File and the instructor's identification number from the class records must match.
- The instructor's record must be included in the Quarterly Staff Extract File.
- The instructor's classes must be included in the Class Schedule File.
- The records in both files must contain specific coding to ensure a match.
- The following matches must exist:
 - The regular class assignment in the extract file and the employment status on the class record must match.
 - The moonlight class assignment in the extract file and the employment status on the class record must match.
 - The PAC code in the extract file and the funding source on the class record must match.

Non-matching records

Class records and Quarterly Staff File Extract records that do not match are modified so that they do not require a match as follows:

- The instructor's employment status in the class records changes to 5 (contracted out) and the FTEF is recalculated.

- The direct instruction PAC codes on the instructor’s Quarterly Staff Extract file record change to “research and development” as follows:
 - 011 changes to 013
 - V11 changes to V13
 - 111 changes to 113
 - 014 changes to 015

For a list of the non-matching records, see the FTEF Distribution & Computation Process Pre-Edit Error Report (SR2901A and SR 2901B).

FTEF calculation by credit equivalent

When calculating FTEF using credit equivalents, the FTEF Calculation and Distribution Process:

- 1** Matches the instructor's classes and the record in the Quarterly Staff Extract File; groups classes assignment (regular, moonlight, or both), funding source, and PAC code.
- 2** Obtains the instructor's total amount of FTEF for each funding category for each class assignment area (regular, moonlight, or both).
- 3** Subtracts pre-entered FTEF amounts from the total FTEF amount or amounts.
- 4** Identifies the lead classes of the class clusters for the instructor.
- 5** Totals the credit equivalent amount for all class sections without the pre-entered FTEF amounts; includes the credit equivalent only for the lead class of a cluster. Totals are comprised of classes within a funding source category, assignment area, or both.
- 6** Divides the total credit equivalent (from step 5) of all classes (for the instructor) in a funding source category into the credit equivalent of a class.
- 7** Multiplies the number resulting from step 6 by the total FTEF amounts for the instructor for that funding source category.
- 8** Subtracts each calculated amount determined by step 7 from the total to ensure that the exact amount is distributed.

FTEF calculation by contact hour

When calculating FTEF using class contact hours, the FTEF Calculation and Distribution Process:

- 1** Matches the instructor's classes and the record in the Quarterly Staff Extract File; groups classes by assignment (regular, moonlight, or both), funding source, and PAC code.
- 2** Obtains the instructor's total amount of FTEF for each funding category for each class assignment area (regular, moonlight, or both).
- 3** Subtracts manually entered FTEF amounts from the total FTEF amount or amounts.
- 4** Identifies the lead classes of the class clusters for the instructor.
- 5** Multiplies the contact hours of each class by weighting factors. The weighting factors are:
 - Number of lecture contact hours multiplied by 432
 - Number of lab contact hours multiplied by 324
 - Number of clinical contact hours multiplied by 216
 - Number of other contact hours multiplied by 162
 - Number of system contact hours multiplied by 360
- 6** Totals the weighted contact hours for all class sections without the manually entered FTEF amounts; includes the weighted contact hours for only the lead class of a cluster. Totals are comprised of classes within a funding source category, assignment area, or both.
- 7** Divides the total weighted contact hours (from step 6) of all classes (for the instructor) in the funding source category into the weighted contact hours of the class.
- 8** Multiplies the number resulting from step 7 by the total FTEF amounts for the instructor for that funding source category.
- 9** Subtracts each calculated amount determined by step 8 from the total to ensure that the exact amount is distributed. If the contact hours for a class are zero, the FTEF for the class is also zero. However, if all class records for the instructor have zero contact hours, the process divides the FTE from the Quarterly Staff Extract File evenly among all class records.

FTEF distribution to class records

The calculated FTEF is distributed to classes according to an instructor's employment status. The distribution process makes the following changes to each class record for which FTEF was calculated:

- C (calculated) is entered as the source of the FTEF.
- The calculated amount of FTEF is entered into the instructor's class records.

Following are the details of how the calculated FTEF amounts are distributed by the instructor's employee status.

Full-Time, Part-Time, Paraprofessional

For an instructor's regular class assignments (REG-FTE in the Quarterly Staff Extract file), the calculated FTEF amount is distributed among the instructor's classes that have an employment status of 1 (full-time), 3 (part-time), or 4 (paraprofessional).

Moonlight

For an instructor's moonlight class assignments (MOO-FTE in the Quarterly Staff Extract file), the calculated FTEF amount is distributed among the instructor's class records that have an employment status of 2 (moonlight).

Contracted-Out Classes

Classes taught by contracted-out effort (employment status 5) are not included in the distribution of FTEF from the Quarterly Staff Extract File. The distribution process calculates FTEF for contracted-out classes using the following steps:

- 1** The distribution process divides the class credit equivalent by 15. The process calculates FTEF only for classes without pre-entered FTEF amounts and for the lead class of a cluster.
- 2** If the class is team-taught, the process divides the calculated FTEF amount by 2.
- 3** The process enters the result as the FTEF for the class. If the credit equivalent value of a contracted-out class is zero, the process enters zero as the FTEF for the class.

Volunteer Classes

Classes taught by volunteer effort (employment status 6) are not included in the distribution of FTEF from the Quarterly Staff Extract File. The distribution process determines FTEF for volunteer effort classes using the following steps:

- 1** The distribution process multiplies the class tenth-day enrollment by .01.
- 2** The process divides the class credit equivalent by 15.
- 3** The process compares the results of step 1 and 2, and enters the smaller amount as the FTEF for the class.

FTEF is calculated only for classes without manually entered FTEF amounts and for the lead class of a cluster.

Checking the Results

This section discusses how to locate errors generated by FTEF Calculation and Distribution Process, how to interpret the error messages provided, and how to troubleshoot and resolve any problems.

You can view the FTEF class assignments, whether manually entered or automatically calculated, on the following screens:

Screen	Screen Name	Can Be Used to See...
IS1002	Class Schedule Screen	Automatically calculated FTEF assignments
IS1004	Class Construction Screen	Automatically calculated FTEF assignments and manually entered FTEF assignments
IS1005	Construction Room/Instructor Screen	Automatically calculated FTEF assignments and manually entered FTEF assignments
IS1015	Alternate Room/Instructor Screen	Automatically calculated FTEF assignments
IS1017	MIS2 Verification Screen	Automatically calculated FTEF assignments

The Faculty Teaching Load/FTEF Analysis Report (IS4102) is also particularly helpful when troubleshooting the results of the FTEF Calculation and Distribution Process. It lists each class for the instructor and the FTEF assigned to that class. All data is displayed by employment status.

The following management reports also display FTEF or use FTEF in the student-to-faculty ratio:

Job	Report	Report Title
IS4101J	IS4101	Teaching Staff Utilization
IS4103J	IS4103A	Faculty Teaching Load FTES/FTEF Analysis: Detail Report
IS4103J	IS4103B	Faculty Teaching Load FTES/FTEF Analysis: Subtotal Report
IS4103J	IS4103C	Faculty Teaching Load FTES/FTEF Analysis: Summary Report

Job	Report	Report Title
IS4104J	IS4104	Comparison of FTES, FTEF and Student-to-Faculty Ratio
IS4106J	IS4106A	Faculty Teaching Load: Detail Report
IS4106J	IS4106B	Faculty Teaching Load: Subtotal Report
IS4106J	IS4106C	Faculty Teaching Load: Summary Report

The Direct Instruction Quarterly Salaries by Course Characteristics report (IS4105) uses data from the Quarterly Staff Extract File and from the class record. However, the functionality of the report is limited because the Quarterly Staff Extract File is available for only one year/quarter at a time and may be complete and accurate for only a short period of time during that year/quarter.

Troubleshooting Problems

FTEF Calculation and Distribution problems are usually caused by the following types of errors:

- An instructor is not on the Quarterly Staff Extract File.
- An instructor has no classes in the Course Schedule File.
- An instructor's Social Security numbers in the Quarterly Staff Extract File and the class schedule records do not match.
- The coding on the Quarterly Staff Extract File and on the class schedule records is not compatible.

The FTEF Calculation and Distribution job (SR2202J) produces the FTEF Distribution & Computation Process Pre-Edit Error Report (SR2901) which lists all the error conditions encountered during the FTEF Calculation and Distribution Process. Following is a list of the error conditions, the probable causes, a checklist of possible contributing factors, and suggestions for corrective action.

Error Message 1: A QTRLY STAFF record was found with no matching (on SSN) CRS records.

Probable cause:

The employee's record on the Quarterly Staff Extract File has a PAC code designating direct instruction; no class records are found for the employee.

Check the following factors:

- Is the direct instruction PAC code accurate? Perhaps another PAC code should be used for the employee.
- Is the same identification number used in the Quarterly Staff Extract File and in the instructor's class records?
- Does the class section have a reject indicator because of MIS2 errors?
- Does the class record have an X or a Z in the first position of section status?
- Was the instructor omitted from the course schedule?

Error Message 2: CRS records were found with no matching (on SSN) QTRLY STAFF record.

Probable cause:

The class record indicates the instructor is being paid through PPMS; however, there are no records in the Quarterly Staff Extract File for the instructor with a PAC code designating direct instruction.

Check the following factors:

- Is the employment status (1, 2, 3, or 4) in the class record accurate? Perhaps another employment status code should be used for the employee.
- Is the same identification number used in the Quarterly Staff Extract File and in the instructor's class records?
- Does the employee have a record in the Quarterly Staff Extract File? If so, does it have a PAC code other than direct instruction?
- Is the employee type code on the Quarterly Staff Extract File correct?
- Does the employee have more than one record on the Quarterly Staff Extract File? Perhaps the direct instruction effort should be recorded as a moonlight assignment (not a part-time assignment).

Error Message 3: The Employment Status on the QTRLY STAFF record is not on the Employment Status table or is blank.

Probable cause:

The employment status code on the Quarterly Staff Extract File must be:

- 1 Full-time
- 3 Part-time
- 7 Sabbatical
- 8 Leave-with-pay

Error Message 4: The Employment Status on the CRS record is not on the Employment Status table or is blank.

Check the class employment status code. The valid employment status codes for use in class records are:

- 1 Full-time
- 2 Moonlight
- 3 Part-time
- 4 Paraprofessional
- 5 Contracted out
- 6 Volunteer
- 7 Sabbatical
- 8 Full-time, but absent due to illness

Error Message 5: The Funding Source on the CRS record is not on Funding Source table or is blank.

Check the class funding source code. The valid funding source codes for use in class records are:

- 1 Fully state funded
- 2 Partially state funded, supplemental
- 3 Partially state funded, shared
- 4 Grant and contract
- 5 Community service

Error Message 6: The Institutional Intent on the CRS record is not on the Institutional Intent table or is blank.

Check the class Institutional Intent code. The valid Institutional Intent codes for use in class records are:

- 1 Academic
- 11 Academic transfer
- 12 Academic basic education
- 13 Academic general education
- 2 Vocational
- 21 Vocational Preparatory

- 22 Vocational Supplemental
- 23 Vocational homemaking
- 3 Community service
- 31 Community service

Error Message 7: The CRS record Institutional Intent is not valid with the corresponding Funding Source.

This edit checks self-support (community service) classes for compatible institutional intent and funding source codes.

- If the institutional intent is 31, the funding source must be 5.
- If the funding source is 5, the institutional intent must be 31.

Error Message 8: The Employment Status on the CRS record is not valid with the QTRLY STAFF Employment Status.

Employment status codes used on the class record must be compatible with employment status codes or employee type codes from the Quarterly Staff Extract File. Valid combinations are:

Class Record Employment Status	Quarterly Staff Record
1	Employment Status 1 (full-time)
2	Employment Status 1 (full-time) Employment Status 7 (sabbatical) Employee Type L (paraprofessional)
3	Employment Status 3 (part-time)
4	Employee Type L (paraprofessional)

Error Message 9: A corresponding Regular or Moonlight CRS record Funding Source not found for the QTRLY STAFF Program Activity Code (PAC).

Each direct instruction PAC code used in the Quarterly Staff Extract File is compatible only with specific funding source codes in the class record. The match must be made with PAC codes for the regular and for the moonlight assignments. Valid combinations of PAC codes and funding source codes are:

PAC Codes	Funding Source Codes
011	1, 2, or 3 (state-supported)
V11	1, 2, or 3 (state-supported)
111	4 (contract)
014	5 (self-support/community service)

Error Message 10: A corresponding Regular or Moonlight QTRLY STAFF record PAC not found for the CRS record Funding Source.

Each funding source code used in class records is compatible only with specific PAC codes in the Quarterly Staff Extract File. The match must be made with funding source codes for regular and for moonlight assignments. Valid combinations of funding source codes and PAC codes are:

Funding Source Codes	PAC Codes
1	011 (direct instruction of a state-supported class) V11 (direct instruction of a state-supported class but the instructor is being paid from federal vocational money)
2	011 (direct instruction of a state-supported class) V11 (direct instruction of a state-supported class but the instructor is being paid from federal vocational money)
3	011 (direct instruction of a state-supported class) V11 (direct instruction of a state-supported class but the instructor is being paid from federal vocational money)
4	111 (direct instruction of a contracted class)
5	014 (direct instruction of a self-supported class)

Error Message 11: The QTRLY STAFF record Regular or Moonlight FTEF is not numeric for the PAC.

Check the Assignment and Salary Data Report (CR6310B); correct the PPMS record.

Error Message 12: The total FTEF for all Pre-Entered CRS records for a Funding Source exceed QTRLY STAFF Regular or Moonlight FTEF for the PAC.

Some or all of the instructor's classes have manually-entered FTEF. This manually entered FTEF, when totaled, is more than the available amount from the instructor's record on the Quarterly Staff Extract File. Check the following factors:

- Is the FTE amount on the Quarterly Staff Extract File accurate? If not, correct the PPMS record.
- Is the FTEF amount which was manually entered in the instructor's class records accurate? If not, make the necessary corrections.

Error Message 13: There are both Pre-entered and Non Pre-entered FTEF CRS records and the total Pre-Entered FTEF = QTRLY STAFF record PAC FTEF.

Some of the instructor's classes have manually entered FTEF. This manually entered FTEF, when totaled, equals the available amount of FTEF from the instructor's record on the Quarterly Staff Extract File. However, the instructor has other classes that have no FTEF assigned.

Check the following factors:

- Is the FTE amount on the Quarterly Staff Extract File accurate? If not, change the appropriate payroll record.
- Has the FTEF amount been entered accurately on the instructor's class records? If not, make the necessary corrections.

Error Message 14: All CRS records FTEF's are Pre-Entered & the total Pre-Entered FTEF QTRLY STAFF record > Regular or Moonlight FTEF for the PAC.

All of the instructor's classes have manually entered FTEF. This manually entered FTEF, when totaled, is less than the available amount of FTEF from the instructor's record on the Quarterly Staff Extract File. There are no class records remaining for the instructor to which the remainder of the FTEF can be assigned.

Check the following factors:

- Is the FTE amount on the Quarterly Staff Extract File accurate? If not, correct the payroll record.

- Has the FTEF amount been entered accurately on the instructor's class records? If not, make the necessary corrections.

Error Message 15: QTRLY STAFF rec FTEF less total Pre-Entered FTEF leaves less than 1% FTEF remaining per Non Pre-Entered CRS rec for the PAC.

Some of the instructor's classes have manually entered FTEF. This manually FTEF, when totaled, is less than the available amount of FTEF from the instructor's record on the Quarterly Staff Extract File. However, the instructor has other classes that have no FTEF assigned and the remainder of the FTEF (when the manually entered amounts have been subtracted from the total) is not large enough to give each class without FTEF at least 1%.

Check the following factors:

- Is the FTE amount on the Quarterly Staff Extract File accurate? If not, correct the payroll record.
- Has the FTEF amount been entered accurately on the instructor's class records? If not, make the necessary corrections.

Error Message 16: There is a Class Cluster with both Pre-Entered and Non Pre-Entered Funding Source FTEF CRS records for the PAC.

Class records in a class cluster must have manually entered FTEF in all or none of the classes of the cluster. If FTEF is manually entered in any classes of a cluster, it must be manually entered in all.

Error Message 17: This Instructor has more than 100 Regular or Moonlight CRS records.

The FTEF Calculation and Distribution Process must be able to assign at least 1% to each class. If the instructor has more than 100 classes for the year/quarter, change the employment status on selected classes to 6 (volunteer).