



*The City of New York*

Financial Information Services Agency

Office of Payroll Administration

Neil Matthew, Executive Director  
Andrea Glick, First Deputy Executive Director

**TO:** Agency HR/Payroll Training Contacts  
**FROM:** FISA-OPA Training  
**DATE:** November 18, 2024  
**SUBJECT:** Payroll Information Administration System Virtual Instructor-Led Training Schedule

NYCAPS agencies: Please login to NYCAPS HRB to waitlist your employees to attend a Pi Admin Training session.

Non-NYCAPS agencies: Please complete and send the accompanying Pi Admin Training Request form via **Remedy** ticket. If a class is full, your employees will be placed on the waitlist.

<u>Class Name</u>	<u>Class Dates &amp; Class Time</u>	<u>NYCAPS Course Code</u>	<u>Course Session Nbr</u>
Payroll Information Administration System Virtual Instructor-Led Training	<b>Day 1</b> – Tuesday, 9/23/2025 (9:30am – 1:00pm) <b>Day 2</b> – Wednesday, 9/24/2025 (9:30am – 1:00pm) <b>Day 3</b> – Thursday, 9/25/2025 (9:30am – 1:00pm) <b>Day 4</b> – Tuesday, 9/30/2025 (9:30am – 1:00pm) <b>Day 5</b> – Wednesday, 10/01/2025 (9:30am – 1:00pm) <b>Day 6</b> – Thursday, 10/02/2025 (9:30am – 1:00pm)	1PiA	F250

Attendees **must** attend the six (6) sessions (3½ hours each session) from start to finish in order to receive a Certificate of Completion.

Attendees **must** have access to CityShare (<https://cityshare.nycnet/>) and be able to access Microsoft Teams.

The above dates/times are subject to change without notice.

## **COURSE DESCRIPTION**

### **Payroll Information Administration System Virtual Instructor-Led Training**

This course will enable City employees responsible for updating employee payroll records to use the Payroll Information (*Pi*) Administration System to view and update employee payroll records. At the end of the course, participants will be able to use the *Pi* Admin System to view employee pay records and to process employee payroll transactions. Topics that will be covered in the class include the following:

- Overview of the Payroll Management System (PMS) and its relation to the *Pi* Administration System.
- Navigation in *Pi* Admin and reviewing Employee Inquiry Screens.
- Processing Elected Deductions, Direct Deposit, Taxes, One Time Payment/Deductions, and Miscellaneous Deduction transactions.
- Overview of the Retroactive Subsystem in PMS; processing Pending Pay Details, and Pending Deductions transactions.
- Processing Retro Pay Trigger, Retro Leave Trigger, and Request for Supplemental Payroll transactions.
- Running and Exporting reports in the *Pi* Administration System.
- How to use the Pay Cycle reports from RMDS (Reports Management Distribution System) to review the agency payroll in order to ensure accurate payments for employees.
- Best practices for processing and reviewing employee records and payroll transactions during pay calc week and pay week.

### **COURSE PREREQUISITE(S):**

1. Participants should be *Pi* Admin users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access *Pi* Admin by their agency *Pi* Admin Security Officer.
3. To successfully complete *Pi* Admin training, participants must have basic desktop computer skills, including navigating Windows, using Chrome or Edge browsers, MS Office Excel and Adobe Reader.

### **UNIT OUTLINE:**

#### **UNIT I: SYSTEM OVERVIEW**

Upon completion of this unit, participants will be able to:

1. State what is *Pi* Admin and its purpose.
2. Name the types of transactions processed by *Pi* Admin.
3. Identify the employee information available to system users.
4. State the security requirements.

#### **UNIT II: OVERVIEW OF PMS**

Upon completion of this unit, participants will be able to:

1. State what is the Payroll Management System (PMS).
2. Identify how PMS processes employee information, and its relationship to *Pi* Admin.
3. Define the different types of City Employees.
4. Identify time references used by PMS.
5. Define wages and other monies paid to City employees.

### UNIT III: GETTING STARTED

Upon completion of this unit, participants will be able to:

1. Logon to Pi Admin with a user ID and password.
2. Navigate through the main menu items.
3. Select an employee record through the Search Employee function.
4. Log off Pi Admin.

### UNIT IV: EMPLOYEE INQUIRY SCREENS

Upon completion of this unit, participants will be able to:

1. View employee transaction records.
2. State the type of information available on the Deduction Parameters, Pay Parameters and FICA Summary inquiry screens.
3. Access summary and detail information on the Deduction Parameters Screen.
4. Access summary and detail information on the Pay Parameters and Pay Balance Summary Screens.
5. Access summary and detail information on the FICA Summary Screen.

### UNIT V: ELECTED DEDUCTIONS

Upon completion of this unit, participants will be able to:

1. Identify and state the types of elected deductions available to City employees: College Savings, IRA, Treasury Direct, Commuter Benefits, NYC Gives, Disaster Relief.
2. Access employee information and add/change employee information for College Savings, IRA, Treasury Direct, Commuter Benefits, NYC Gives, Disaster Relief deductions.

### UNIT VI: DIRECT DEPOSIT

Upon completion of this unit, participants will be able to:

1. Identify what is a Direct Deposit deduction.
2. View the Direct Deposit History List for an employee.
3. Add, Update or Cancel Direct Deposit information for an employee.
4. View and Update Pay Stub Printing Status information for an employee.

### UNIT VII: TAXES

Upon completion of this unit, participants will be able to:

1. View the employee's Withholding Allowance Certificate.
2. View the employee's additional tax withholdings for Federal, State, or Local taxes.
3. Process an update to the employee's Withholding Allowance Certificate.
4. Add, update or expire the employee's additional tax withholdings for Federal, State, or Local taxes.
5. View and update the employee's W2 print status.

#### UNIT VIII: ONE TIME PAYMENT/DEDUCTION

Upon completion of this unit, participants will be able to:

1. Enter a One-Time Payment transactions for an employee.
2. View a submitted One-Time Payment.
3. Delete a submitted One-Time Payment transaction.
4. Enter a One-Time Deduction transactions for an employee.
5. View a submitted One-Time Deduction.
6. Delete a submitted One-Time Deduction.

#### UNIT IX: OVERVIEW OF RETRO PROCESSING AND PENDING PAY

Upon completion of this unit, participants will be able to:

1. State the process the PMS uses to generate retro pay and retro leave.
2. Access the pending pay details report by Payroll Distribution or by Individual Employee.
3. Sort, filter and export the report.
4. State the difference between the 160 Report (Pending Pay Details Awaiting Approval) and the 161 Report (All Pending Pay Details).
5. Process an Individual Hold/Approve/Delete transaction.
6. Process an Employee Level Approve/Hold transaction.
7. Process a Mass Payment Approval transaction.

#### UNIT X: PENDING PAY DETAILS

Upon completion of this unit, participants will be able to:

1. Identify the reasons why details appear on the Pending Pay reports.
2. List reasons why negative details appear.
3. List reasons why positive details appear.
4. List steps to reconcile details on the Pending Pay Details reports.
5. Resolve common scenarios associated with pending pay details.

#### UNIT XI: PENDING DEDUCTIONS

Upon completion of this unit, participants will be able to:

1. Access the Pending Deduction Report by Deduction Code, Individual Employee, or All Records.
2. Process an Individual Deduction Delete to remove a pending pay deduction from an employee's record.
3. Delete a previously submitted Deduction Delete transaction.

#### UNIT XII: MISCELLANEOUS DEDUCTIONS/GOAL

Upon completion of this unit, participants will be able to:

1. Determine the appropriate way to process a miscellaneous deduction (recurring or goal-oriented).
2. Enter a Miscellaneous Deduction.
3. View a submitted Miscellaneous Deduction.
4. Delete a submitted Miscellaneous Deduction.

### UNIT XIII: RETRO PAY TRIGGER

Upon completion of this unit, participants will be able to:

1. Determine whether to process a Retro Pay Trigger.
2. Determine the correct Retro Pay Start Date to use.
3. Enter a Retro Pay Trigger.
4. View a submitted Retro Pay Trigger.
5. Delete a submitted Retro Pay Trigger.

### UNIT XIV: RETRO LEAVE TRIGGER

Upon completion of this unit, participants will be able to:

1. Determine whether to process a Retro Leave Trigger.
2. Determine the correct Retro Leave Start Date to use.
3. Enter a Retro Leave Trigger.
4. View a submitted Retro Leave Trigger.
5. Delete a submitted Retro Leave Trigger.

### UNIT XV: REQUEST FOR SUPP PAYROLL

Upon completion of this unit, participants will be able to:

1. Determine whether to process a Supplemental paycheck for an employee.
2. Determine which Supplemental pay option to use.
3. Identify the difference between Supplemental Pay Options ‘S’ and ‘C.’
4. Enter a Request for Supplemental Payroll.
5. View a submitted Request for Supplemental Payroll.
6. Delete a submitted Request for Supplemental Payroll.

### UNIT XVI: REPORTS

Upon completion of this unit, participants will be able to:

1. Retrieve reports previously created for export (i.e., Pending Pay Details).
2. Generate a transaction report using filters by Payroll Number, Date Range, and Form Type.
3. Export a transaction report using filters by Payroll Number, Date Range, and Form Type.
4. Review and analyze information from selected Employee Transaction and Pay Cycle reports from RMDS (Reports Management Distribution System).
5. Identify Miscellaneous Payroll Information.



# REQUEST FOR Pi TRAINING (Non-NYCAPS Agencies)

Agency Name: \_\_\_\_\_

Agency Training Contact: \_\_\_\_\_ Phone No: \_\_\_\_\_

Agency Payroll No.: \_\_\_\_\_ Date: \_\_\_\_\_

PARTICIPANT'S NAME AND EMPL NUM <i>(Please Print or Type)</i>		In order to ensure a good match between participant and course, please answer the following questions.	
		1. Is the employee currently a PMS User?	2. If Yes to #1, how long has employee worked on PMS?
1. Name:	Empl Num:		
2. Name:	Empl Num:		
3. Name:	Empl Num:		
4. Name:	Empl Num:		
5. Name:	Empl Num:		

Submitted by: \_\_\_\_\_ Tel. No./Email: \_\_\_\_\_

Approved by: \_\_\_\_\_ Tel. No./Email: \_\_\_\_\_

**Non-NYCAPS Agencies: Please submit the completed Request for Training form via a Remedy ticket.**

We look forward to seeing your employees at Pi Training.