

Generate PMR

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Principal's Monthly Report (PMR) Overview

Overview

The Principal's Monthly Report (PMR) provides attendance and membership information used for North Carolina state and federal reporting. PMR data is also used to determine funding based on Average Daily Membership (ADM).

The PMR is completed for 9 school month reporting intervals during the school year. Each reporting period includes a series of reports and data validations used to review attendance, membership, enrollment, and related student information before the PMR is submitted.

PMR Resources and Requirements

The School Attendance and Student Accounting (SASA) Manual (https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/student-accounting#SASAManual-1394) is the authoritative source for North Carolina student accounting requirements and policy. Refer to the SASA Manual for policy requirements related to the Principal's Monthly Report (PMR), attendance, membership, enrollment and student accounting.

Refer to the NC Principal's Monthly Report Extract | Infinite Campus (https://kb.infinitecampus.com/help/nc-principals-monthly-report-extract) article for technical specifications and system information related to the PMR reports, including report options, data elements, calculations, and the generation, review, and submission functionality.

The NCSIS Knowledge Base provides North Carolina specific guidance for completing the PMR process, reviewing reported data, identifying potential data issues, and correcting source data.

PMR Reporting Information

The PMR includes several measures used to report school attendance and membership:

- **Average Daily Attendance (ADA)** measures student attendance during the school month.
- **Average Daily Membership (ADM)** measures student membership during the school month.
- **Membership Last Day (MLD)** reports membership information for the last day of the reporting interval.
- **Grade, Race, and Sex (GRS)** provides membership information by grade level and demographic group.

The **PMR Summary** provides school level totals for the reporting period. Supporting PMR extracts provide additional calendar and student level information that can be used to verify the reported totals and investigate unexpected data.

PMR Reporting Population

PMR reporting uses enrollment, calendar, and school information to determine which students are included in the reporting population.

Students must meet applicable PMR reporting requirements, including requirements related to:

- Enrollment
- Grade Level
- Admission Status
- Enrollment Status
- Calendar Configuration
- School Configuration

Summer school calendars are excluded from PMR reporting.

Note: A student may have an enrollment during the school year but not meet the requirements for inclusion in PMR reporting. Use the Review Students Not Included in PMR (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-students-not-included-in-pmr) extract when an expected student does not appear in PMR.

PMR Data Validations

PMR Data Validations identify records that require correction or review. Validations run as part of the PMR generation process.

Severity	Meaning	Action
FATAL	Identifies an issue that prevents the PMR from successfully generating.	Correct the identified issue, then rerun the validation.
WARNING	Identifies data that may affect the PMR reporting and requires review.	Investigate the reported data and correct it when inaccurate.
INFO	Identifies a condition that should be reviewed for accuracy or awareness.	Verify that the reported condition is accurate or expected.

Note: A WARNING or INFO validation does not necessarily indicate that the reported data is incorrect. Review the identified record before making changes.

PMR Reporting Process

Complete the PMR process in the following order:

1. **Generate the PMR -** Generate the PMR Summary for the applicable school month.
2. **Resolve validation issues -** Correct FATAL validation issues and review WARNING and INFO validation results.
3. **Review PMR data -** Review calendar, membership, attendance, and supporting student level information.
4. **Verify the PMR Summary -** Confirm that school level PMR totals are supported by the reviewed data.
5. **Submit the PMR -** Complete the required reviews and submission process.

Important: A PMR Summary total that appears reasonable, does not confirm that all underlying student data is correct. Review the supporting PMR data before submitting the report.

PMR Data Review

PMR extracts provide summary, student level, and calendar information that can be used throughout the PMR review and troubleshooting process.

Report	Information Provided	Use
Month Summary	School Month dates, instructional days, and instructional minutes	Review calendar information when PMR results indicate additional calendar review is needed.
ADM Summary	Student level membership ADM	Review individual membership and reconcile ADM.
ADA Summary	Student level attendance and ADA	Review individual attendance and reconcile ADA.
Student Day Detail	Daily membership and attendance calculations	Investigate the instructional day contributing to an unexpected ADM or ADA result.
Day Detail	Daily calendar and instructional information	Identify the calendar date and instructional information represented by each PMR day.
ADM 10-Day Violation Detail	Student level violation information	Review students whose membership is affected by the Ten-Day Rule.
Students Not Included in the PMR Summary	Students excluded from the PMR population	Determine why an expected student is not included.
PMR Summary	School level PMR totals	Complete the final reconciliation of reviewed PMR data.

Report	Information Provided	Use
PMR data should be corrected in the applicable source record. Depending on the issue, review the student's enrollment, schedule, attendance, or the applicable calendar information.		

Next Steps

Begin with **Generate Principal's Monthly Report (PMR)** (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/generate-pmr-process) for guidance on starting the PMR process.

After the PMR generates successfully, follow **Review Principal's Monthly Report (PMR) Data** (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-pmr-data) for the recommended data review workflow.

Generate Principal's Monthly Report (PMR)

Overview

The **PMR Summary Report** can be generated during the active school month to preview current reporting data. During the **PMR Preview Period**, use the PMR Summary Report and supporting Extract Types to monitor data and identify potential issues as the school month progresses.

After the school month ends, generate the PMR Summary Report to begin the validation, review, and submission process. The applicable PMR Data Validations run to identify data that must be corrected or reviewed before the PMR is submitted.

Accurate enrollment, attendance, schedule, and calendar information is essential to accurate PMR reporting.

Important: The School Attendance and Student Accounting (SASA) Manual is the authoritative source for North Carolina student accounting requirements and policy. Refer to the SASA Manual (https://www.dpi.nc.gov/districts-schools/district-operations/financial-and-business-services/student-accounting#SASAManual-1394) for PMR policy requirements.

Refer to the NC Principal's Monthly Report Extract | Infinite Campus (https://kb.infinitecampus.com/help/nc-principals-monthly-report-extract) article for technical specifications and detailed instructions for using the NC PMR Collection.

PMR Preview and Generation Periods

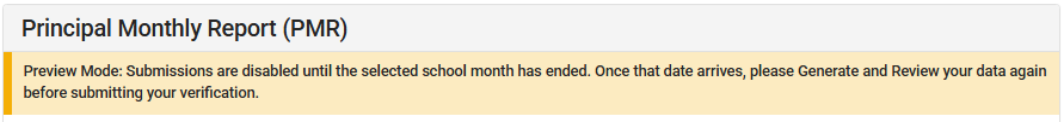
The PMR Summary Report can be generated during the active school month to preview current reporting data. The system determines whether the PMR Preview Period is active based on the Start Date and End Date of the selected School Month Sequence.

During the PMR Preview Period

The Preview Period begins on the Start Date of the school month and continues through the End Date.

During this period:

- A banner displays in the NC PMR Collection indicating that the PMR Preview Period is active.



- Generate the PMR Summary Report to monitor reporting data as the school month progresses.
- PMR Data Validations do not run automatically when the PMR Summary is generated during the Review Period. Run the applicable PMR Data Validations manually to identify records that require correction or review.
- The data reflects information available at the time the report is generated and may change as additional enrollment, attendance, schedule, and calendar information is entered or corrected.

> **Tip:** Use the Preview Period to spot-check PMR data and identify potential issues before the school month ends. Review and correct inaccurate source data as issues are identified.

Other PMR Extract Types, except Best 1 of 2, are not restricted to the Preview Period and can be used to review supporting data as needed.

After the PMR Preview Period

After the Preview Period ends and the PMR enters the Submission Window, generating the PMR Summary runs the applicable PMR Data Validations for the selected School Month Sequence.

- Review and resolve **FATAL** validation issues before the PMR Summary can successfully generate.
- Review **WARNING** and **INFO** validation results for accuracy.
- Continue the recommended PMR data review before verifying and submitting the report.

Before PMR Generation After the Preview Period

Before generating the PMR Summary Report after the Preview Period:

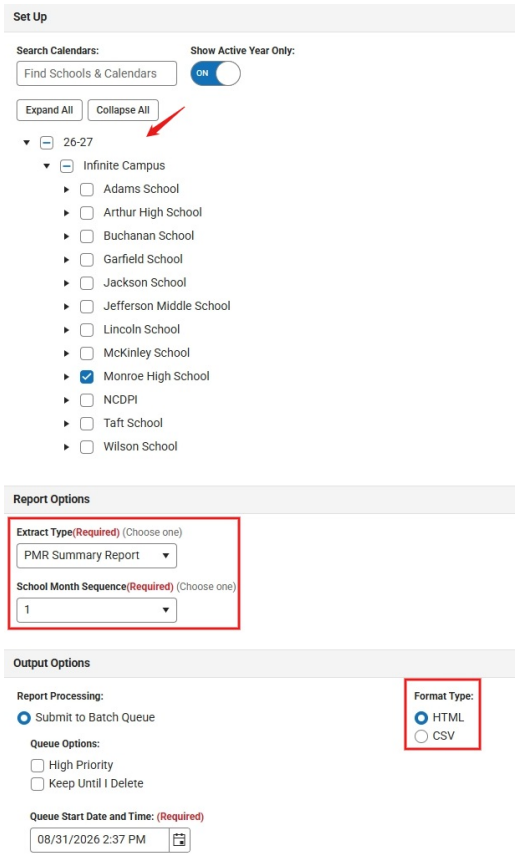
- Confirm the correct School Month Sequence is selected.
- Confirm enrollment and withdrawal information for the reporting interval is current.
- Confirm attendance information for the reporting interval has been entered and reviewed.
- Confirm applicable student schedule changes have been entered.
- Correct known calendar, enrollment, schedule, and attendance issues identified during the Preview Period.

> **Tip:** Use the PMR supporting Extract Types during the Preview Period to identify potential data issues before the school month ends.

Generate the PMR Summary

Navigation: Menu > Reporting > NC State Reporting > NC PMR Collection

- Open the **NC PMR Collection**.
- Select the applicable **School Year** and **Calendar**.
- Select the **PMR Summary Report** extract type and the applicable **School Month Sequence**.
- Select **HTML** or **CSV** as the Format Type depending on how to view the summary report.



The system runs the applicable PMR Data Validations for the selected school month.

If FATAL Validations Are Identified

The PMR Summary Report is not created when a FATAL validation is identified.

1. Open the applicable **M# PMR Fatal Data Validation** report.
2. Review each identified FATAL validation.
3. Correct inaccurate source data. See the PMR Fatal Validations (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/pmr-fatal-validations) articles for correction options.
4. Rerun the **M# PMR Fatal Data Validation** to confirm the issue is resolved.
5. Generate the **PMR Summary Report** again after all Fatal validation issues are resolved.

Refer to Review PMR Data Validations (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-pmr-data-validations) for information about FATAL, WARNING, and INFO individual rules.

If the PMR Summary Report Generates Successfully

A successful PMR Summary Report generation creates the applicable data for the reporting interval.

Do not submit the PMR based only on a successful generation.

Continue to Review Principal's Monthly Report (PMR) Data (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-pmr-data) to review the calendar and supporting student level PMR data before verifying the PMR Summary.

Special Reporting Months

Some PMR reporting months include additional processing.

Month 2

When School Month Sequence 2 is generated, the system also processes a rerun of Month 1.

If the required validations are cleared:

- Month 1 data is captured again as Month 1R.
- Month 2 data is captured.
- The most recent Month 1 data is used with Month 2 for the Best 1 of 2 ADM process.

> **Note:** Review and correct Month 1 data before completing Month 2 processing. Changes to source data may affect the Month 1R results.

Month 9

When School Month Sequence 9 is generated, the system processes PMR Data Validations for Months 1-9.

If the required validations are cleared, the system captures updated data for the applicable previous reporting months and Month 9.

Review month 9 carefully to ensure corrections made during the school year are accurately reflected in the final PMR data.

After Generating the PMR

Follow the PMR workflow based on the generation results.

Result	Next Step
Fatal validation identified	Review and resolve the applicable M# PMR Fatal Data Validation.
Expected student is missing from PMR	Review Students Not Included in the PMR Summary.
PMR Summary generates successfully	Continue to Review Principal's Monthly Report Data.
Unexpected calendar, ADM, or ADA data is identified during review	Use the applicable PMR supporting report to investigate the source data.

Next Steps

After the PMR Summary generates successfully:

- Review applicable **WARNING** and **INFO** PMR Data Validations (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/pmr-data-validations) results.
- Continue to Review PMR Data (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-pmr-data) to complete the recommended data-review workflow.
- Use Troubleshoot PMR (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/troubleshoot-pmr) if an issue is identified during the review.

Important: Do not submit the PMR based only on successful generation. Complete the applicable PMR data review (https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-pmr-data) and confirm that the PMR Summary is accurate before submission.

NEXT: Continue to **Review PMR Data** after the PMR Summary generates successfully.

(https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/review-pmr-data)

If an issue prevents generation or unexpected data is identified, use **Troubleshoot PMR**.

(https://ncdepartmentofpublicinstruction.knowledgeowl.com/home/troubleshoot-pmr)