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: December 1, 2025

SUBJECT: CHRMS Class Schedule

Please login to NYCAPS HRB to waitlist your employees to the appropriate CHRMS training session.

Class Number/Name	Class Date & Time	NYCAPS Course Code	NYCAPS Session Nbr.
7H – CHRMS WEB CANNED QUERY In-Person at FISA-OPA	2/3/26 (1 day: 9:15am to 5:00pm)	7H	W260
	4/14/26 (1 day: 9:15am to 5:00pm)		S260
	6/3/26 (1 day: 9:15am to 5:00pm		S261
7J – CHRMS WEB AD HOC In-Person at FISA-OPA	2/11/26 (1 day: 9:15am to 5:00pm)	7J	W260
	4/22/26 (1 day: 9:15am to 5:00pm)		S260
	6/23/26 (1 day: 9:15am to 5:00pm)		H260
7L – CHRMS PPMS AD HOC (NOT IACET ACCREDITED) In-Person at FISA-OPA	PENSION AGENCIES ONLY	7L	
	3/11/26 (1 day: 9:15am to 5:00pm)		W260
	6/17/26 (1 day: 9:15am to 5:00pm)		S260

The above dates/times are subject to change without notice.
CHRMS classes are held **In-Person at FISA-OPA**, 5 Manhattan West, NY, NY 10001.
Trainees **must** attend a **CHRMS** class from start to finish in order to receive a Certificate of Completion.
Please do not arrive at FISA-OPA without an e-mail from FISATraining confirming your enrollment.
CHRMS Web Page: https://cityshare.nycnet/content/cityshare/pages/hr-payroll-systems-training/chrms.

ACCREDITED IACET PROVIDER

FISA-OPA's HR-Payroll Training Unit is accredited by the International Association for Continuing Education and Training (IACET) and is authorized to issue the IACET CEU.

CHRMS Security Officers must ensure that the IDs and passwords for their agency's employees are ready for use *prior* to the scheduled class date. Agencies must be in compliance with security policies before employees can be scheduled for training. Security forms must be submitted via a Remedy ticket to OPA CPSM-Security no later than two (2) weeks before the class date.

Reminders for CHRMS Security Officers:

1. If your employee(s) are scheduled for **CHRMS Web Canned Query,** you must submit the Request for CHRMS ID Form to OPA CPSM Security ***before*** they attend class. ***Effective June 22, 2015,*** *first time CHRMS Users can now receive their respective CHRMS Canned Query User ID and password upon approval from OPA CPSM Security, prior to attending the Canned Query training. Please contact OPA CPSM-Security to obtain the employee's CHRMS ID and password. Participant(s) should know their CHRMS ID and password when they come to training.*

2. If your employee(s) are scheduled for **CHRMS Web Ad Hoc,** you must submit the Request for CHRMS ID Form to OPA CPSM Security to add the *CHRMS Ad Hoc Report Writer* link to the employee's existing CHRMS ID ***before*** they attend the class.

3. If your employee(s) are scheduled for **CHRMS PPMS Ad Hoc,** you must submit the Request for CHRMS ID Form to OPA CPSM Security to add the *CHRMS PPMS Report Writer* link to the employee's existing CHRMS ID ***before*** they attend the class.

4. Employee(s) scheduled for **CHRMS** must know their CHRMS logon ID and password when they come to class. If a participant has forgotten his/her password, you must request a password reset ***before*** the class date.

Thank you for your cooperation.

CHRMS Courses

CHRMS stands for CITY HUMAN RESOURCE MANAGEMENT SYSTEM. It is a data warehouse for City employees with records in the Payroll Management System (PMS), and for retirees or beneficiaries with records in the Pension Payroll Management System (PPMS). CHRMS users can access information on employees more easily and efficiently through the use of Canned Queries, which are pre-formatted reports, or by creating their own Ad Hoc (as needed) reports by using Report Writer.

Course 7H: CHRMS Web Canned Query

Instructor-led Training course where class participants will use their own CHRMS logon ID and password to learn how to run Canned Query (pre-formatted) reports to retrieve pay, deduction, personnel, or leave data, as currently maintained in the City's payroll systems.

Objectives:

- Logon and navigate through CHRMS.
- Perform an Employee Lookup.
- Generate and output Canned Query reports.
- Use the Set Properties function to customize and save a report with pre-set query parameters.
- Schedule a report to run automatically.
- Analyze written requests for data in order to identify the query needed and run the query to get the data results from CHRMS.

Prerequisites:

1. Participants should be first time CHRMS users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to the FISA-OPA's *Payroll Operations – Citywide Maintenance and Integrity Unit*.
3. Participants must have their own valid CHRMS logon ID and password and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills including navigating Windows, MS Office Excel, and Adobe Reader.

Length: 1 day

CEUs: .5 CEU.

Assessment Method(s): Instructor observation, question & answer discussions, oral quiz, completion of hands-on exercises.

Course 7J: CHRMS Web Ad Hoc

Instructor-led Training (ILT) course where class participants will use their own CHRMS logon ID and password to learn how to create Ad Hoc (as needed) reports using the Report Writer package in CHRMS to retrieve pay, deduction, personnel or leave data, as currently maintained in the City's payroll systems.

Objectives:
Upon the completion of this course students will be successful three out of five times creating on the job ad hoc reports to solve a business problem or to answer a business question by determining what type (List or Crosstab) of report is needed based on the situation, the information the report should contain, creating and editing the query to generate the report by inserting data, filtering, calculating, summarizing and grouping information, formatting the report, applying page and section breaks, creating headers/footers, saving and printing the report.

UNIT I: CHRMS OVERVIEW
Upon completion of this unit, participants will be able to:

1. Explain what CHRMS is and where it gets its information.
2. Describe PMS table structure.
3. Distinguish between quarries and reports.
4. Explain what is crucial when creating a report.
5. List the field types and the data they contain.
6. Explain what an object is.
7. Explain the significance of property of the objects.

UNIT II: NAVIGATION AND UNDERSTANDING THE DATA SOURCE
Upon completion of this unit, participants will be able to:

1. Logon to CHRMS and navigate to the Report Writer home page.
2. Describe the layout of Report Writer home page.
3. Identify groups, tables, and data items from the source.
4. Explain the type of information in each group.
5. Explain the type of information in tables within a group.
6. Explain the type of information that a data item contains.
    a) Review Personal data: Employee Current vs. Employee History.
    b) Review Employee Data: Pay Summary.
    c) Review Data Relationships: Employee Pay - Pay Detail.
    d) Review Data Relationships: Leave summary vs. Leave Balances.
    e) Review Employee Data: eave Detail Accrual
    f) Review Data Relationships: Check Deductions.
    g) Review Employee Data: Deduction Parameters.

UNIT III: Create a List Report with basic filters.

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

1. Define Report output based on report request/business question/need.
2. Choose group and table that contains the data item needed for the report.
3. Insert data items in the query using the simplest technique.
4. Demonstrate that the data items inserted in the query are in the correct order and from the correct group and table.
5. Preview and save the report.
6. Show the property for each object/data item that is selected on Page 1 of the report.
7. Insert and modify Header and Footer separately in the report.
8. Apply and modify filters on data items with count (numeric) and text (alphabetic or alphanumeric) information.
9. Remove columns keep filters.
10. Apply and modify sort on data items.
11. Apply and modify arithmetic calculations and summarization on Count (numeric) data items.
12. Apply and modify formatting to data items (column heading, column body)
13. Apply grouping and section and page break to report.
14. Run report with all data.

UNIT IV: Create List report that uses date filter.

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

1. Define Report output based on report request/business question/need.
2. Choose group and tables that contains the data item needed for the report.
3. Insert data items in the query using the multiple selection techniques.
4. Demonstrate that the data items inserted in the query are in the correct order and from the correct group and table.
5. Preview and save the report.
6. Show the property for each object/data item that is selected on Page 1 of the report.
7. Insert and modify Header and Footer simultaneously in the report.
8. Apply and modify filters on data items with date (numeric) and text (alphabetic or alphanumeric) information.
9. Remove columns keep filters.
10. Apply and modify formatting to data items (column heading, column body)
11. Apply grouping to the report.
12. Run report with all data.

UNIT V: Create a Crosstab report based on data summarized by date.
Upon completion of this unit, participants will be able to:

1. Define Report output based on report request/business question/need.
2. Choose group and tables that contains the data item needed for the report.
3. Insert data items in the query using all techniques.
4. Demonstrate that the data items inserted in the query are in the correct order and from the correct group and table.
5. Preview and save the report.
6. Insert a Header.
7. Apply and modify filters on data items with date (numeric) and count (numeric) information.
8. Remove columns keep filters.
9. Apply and modify arithmetic calculations (date) data item.
10. Apply formatting to data items (column heading, column body)
11. Apply Pivot to create a Crosstab report.
12. Run report with all data.

UNIT VI: Create a List report that uses historical data.
Upon completion of this unit, participants will be able to:

1. Define Report output based on report request/business question/need.
2. Choose group and tables that contains the data item needed for the report.
3. Insert data items in the query using the multiple techniques.
4. Demonstrate that the data items inserted in the query are in the correct order and from the correct group and able.
5. Preview and save the report.
6. Insert Header in the report.
7. Apply filters on data items with date (numeric) information.
8. Remove columns keep filters.
9. Apply sort on data items.
10. Apply summarization on text (alphanumeric) data items.
11. Run report with all data.

Prerequisites:

1. Participants should be first time CHRMS Ad Hoc users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS Ad Hoc by their agency CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training. Requests for access should be sent via a Remedy ticket to the FISA-OPA's *Payroll Operations – Citywide Maintenance and Integrity Unit*.
3. Participants must have their own valid CHRMS logon ID and password with access to CHRMS Report Writer and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills including navigating Windows, using MS Office Excel, and Adobe Reader.

Length: 1 day.

CEUs: .5 CEU.

Assessment Method(s): Instructor observation, question & answer discussions, oral quiz, completion of hands-on exercises.

Course 7L: CHRMS PPMS Ad Hoc

PENSION AGENCIES ONLY

Instructor-led Training (vILT) course where class participants learn the theory and methods needed to create Ad Hoc pension data reports in CHRMS. Study includes interpreting requests for reports or the business need, understanding the PPMS table structure and fields, creating reports with filters, calculations and formatting options. This course guides and empowers the user to build and run their own reports.

This course presents the concepts, tools and methods used to create, edit and manage customized ad hoc pension data reports in CHRMS. Learners will become familiar with the PPMS data model structure and unique characteristics of PPMS data. Learners will use Filters, Calculations, Grouping, Summarization, Format, and Run Report options to create data reports that answer specific business questions, output their report and save their query for future use.

Objectives:

UNIT VII: INTRODUCTION

1. Define what CHRMS PPMS Ad hoc is.
2. Describe pension data types: Recipients, Deductions and Payments.
3. Explain payment types in PPMS: Periodic Payments – recurring pension and annuity payments to retirees/beneficiaries on a recurring basis; non-Periodic payments - loans, refunds, death benefits and rollovers.
4. Differentiate between summary data and detail data.
5. Describe the overnight batch processing of PPMS data updates on mainframe and the PPMS Reference tables.

UNIT VIII: PENSION PAYROLL ENVIRONMENT - KEY CONCEPTS

1. Logon to CHRMS environment and locate the PPMS Ad Hoc package.
2. Navigate the menus and items.
3. Explain the package structure and tables in the CHRMS PPMS Ad Hoc package.
4. Identify pension related data tables and fields.
5. Explain best practices for selecting data items.
6. Identify the purpose and desired output for the report, based on the needs of the person(s) who requested the data.
7. Review examples of simple queries: current data example, historical data example and “As-of,” and “From-to” queries.
8. Identify and format the data items required for the pension recipient ID: Pension System Code, Pension Number and Pension Suffix.

UNIT IX: CASE SCENARIO 1: Create a report showing active recipients and the retirement cause for members who retired between Jan 1, 2011, and Dec 31, 2015 and are still currently active, grouped by retirement cause. Then, summarize the data to show the total number of recipients in each retirement cause category.

1. Define the purpose of the report and identify the report output.
2. Explain the importance of inserting fields when data is turned off; locate and turn off the display of data while creating the query.
3. Insert the correct fields in the report.
4. Create report Title and Subtitle and save the report.
5. Explain and apply filters to the Leave Status Code, Leave Status Effective Date, and the Pension System Code.
6. Concatenate the fields used to create the Recipient ID.
7. Select/highlight fields to perform format changes, calculations, and copy/paste.
8. Create summaries by removing detail data from the report and using the Summary function.
9. Group report data by Retirement Cause Code.
10. Run report to display limited data and all data.
11. Display and explain the purpose of the Report Definition.

UNIT X: CASE SCENARIO 2: Create a report showing all active recipients with all pay parameters as of January 15, 2019.

1. Define the purpose of the report and identify the report output.
2. Use the Report Definition to insert the correct fields, then title and save the report.
3. Use the Report Definition to verify that the columns selected are correct.
4. Rename column headings.
5. Create a filter for “As of” date using the Effective Date and Expiration Date fields.
6. Apply additional filters to identify the recipients that answer the business question.
7. Create Summaries using the Count function.
8. Group report data by Recipient ID.
9. Run report to display limited data and all data.

UNIT XI: CASE SCENARIO 3: Create a PPMS Ad Hoc report that calculates the summary amounts of check deductions in Fiscal Year 2019 for all pension recipients.

1. Define the purpose of the report and identify the report output.
2. Use the Report Definition to insert the correct fields, then title and save the report.
3. Apply filters to the Deduction Code, Pension System Code and Pay Date fields.
4. Create subtotal and grand total for the Deduction Amount and format the amounts to appear as currency.
5. Run report to display limited data and all data.

UNIT XII: CASE SCENARIO 4: Create 3 PPMS Ad Hoc reports showing Pending Pay Summary by Agency, Pending Pay Summary by Recipient and Pending Pay Detail by Recipients.

1. Define the purpose of the reports and identify the report output.
2. Use the Report Definition to insert the correct fields, then title and save the report.
3. Apply filters and use the Summary function.
4. Title and save the report as Pending Pay Detail by Recipient.
5. Modify the Pending Pay Detail by Recipient and save the new report as Pending Summary by Recipient.
6. Modify the Pending Pay Summary by Recipient and save the new report as Pending Summary by Pension Agency.

Prerequisites:

1. Participants should be first time CHRMS PPMS Ad Hoc users who did not previously attend this course.
2. Prior to attending training, participants must be authorized to access CHRMS PPMS Ad Hoc by their Agency's CHRMS Security Officer. Agency CHRMS Security Officers must ensure that the agency is in security compliance in order for participants to attend CHRMS training, and that their employee(s) have their IDs and passwords in time for training.
3. Participants must have their own valid CHRMS logon ID and password with access to CHRMS Report Writer and know their CHRMS ID and password when they arrive at the training session.
4. To successfully complete CHRMS training, participants must have basic desktop computer skills including navigating Windows, MS Office Excel, and Adobe Reader.

Length: 1 day

CEUs: Not IACET accredited.

Assessment Method(s): Instructor observation, question & answer discussions, oral quiz, completion of hands-on exercises