Vacant & Other PC Adjustments (6300)

Initiator: Any budget employee
Reason: Report on vacant positions at your agency.
General Notes:

- This form allows information to be loaded into the system to then show on the "Personnel Cost Forecasting (PCF)" report.

- This budget form is one of many budget forms that establish Personnel Costs (PC) data for the PCF report:

    o Line Item & Supplemental Requests (5100)

    o DU 8 Series Transfer (5600)

    o Vacant & Other PC Adjustments (6300)

    o Salary & Benefit Changes (6200)

    o Position Allocation (8100)

- Changes by position must be noted in the comments if the vacant position salary changes but the base PC budget remains the same.

- If there are any additional funding or upgrades needed for a vacant position, the request must be made in a 04.3x or 12.0x DU on the 5100 form.

- Utilize the 8 series Transfer Request (5600) to complete vacant position transfers.

    Create a Parent Entry

    1. Select form 6300 from the form dropdown menu to open the form's summary overview screen.

        - This screen will list all entries matching the stages (workflow steps) associated with the user's access in the system.

    2. Click **Add New** to open the "Create a new Budget Form – 5800" screen.

3. Select the appropriate **Stage** and **Agency**.
   - Not all budget forms start in Stage 1.
   - Agencies you have permission to access will appear in the field's lookup tool.

4. Click **Save** to continue to the "Budget Form Header" screen.

Note: Form 6300 does not have narrative description fields. If additional explanations are required, utilize the "Attachments" tab to upload supporting documentation.

5. Select the "Vacant Position Funding" tab.

L😊ma

VACANT POSITION FUNDING TAB

- Vacancies listed on this tab are pulled from the annual HR upload which occurs mid-July. The data reflects a snapshot in time, and may no longer be accurate.

- Agencies need to review all their vacant positions to ensure salaries, benefits, and allocations are recorded accurately for their base budget spending report.

- Requests to increase salaries of vacant positions beyond the base budget should be entered as a request on the 5100 form.

Select Positions for Editing

1. From the "Budget Form Header" screen, select the "Vacant Position Funding" tab to open the "Form Positions" screen.

2. This screen lists all selected vacant positions. Click **Employee Changes** to open the "Employee Maintenance" table.

Note: Above the vacant IT Manager III position shows "-F8401" at the end of the employee number. This indicates that this position was selected in another budget form.

➢ **Position (number):** This is a budget system assigned number. It begins with the three-digit agency number and then the PCN number assigned to the position.

➢ **Position Name:** This is tied to the job class number and is pulled from the HR system.

➢ **Job Class (number):** The state assigned number and title for the position.

LUma

- ➢ **Employee (number):** EIN system-generated number assigned to each position. Vacant position employee numbers will begin with "Z".
- ➢ **Name:** Name of the employee assigned to the position as of the date the PCF data is loaded. If a position is vacant it will state "VACANT".
- ➢ **Home Orgn:** This is the appropriation unit that has been designated as the employee's "home" organization.
- ➢ **Employee Count:** 1 position.
- ➢ **Status:** "Original" means a currently filled position without any existing changes.
- ➢ **Actions:** Column for the action record buttons to select a position for changes.

3. Click the **Select** button next to a position you would like to update or verify.

4. Selecting a position will bring up the "Edit Form Position" screen. Verify you selected the correct position before clicking **Add to Form**.
   - Position changes cannot be saved on this screen.

Note: Agencies that manually enter their vacant positions will need to add all of their vacant positions to the form in order to verify and record them properly.

5. The "Employee Maintenance" screen will display, allowing you to select additional vacant positions.

6. Continue to add positions to the form as needed. When all selections are made, click **Close** to return to the "Form Positions" screen.

Luma

FORM POSITIONS

- The Form Positions screen will appear with two entries for each position; a reversing entry backing out the original values and a positive entry showing your changes.

- The reversing or negative entry is indicated with an "N" on the number in the "Employee" column.

1. Click **Calculate** (once) to load the salary and benefit numbers.
   - Calculating can take 45 seconds or longer. Clicking **Calculate** again will restart the calculation and delay your results.
   - Once calculated, **Refresh** and **Status** can be used to update the data.
   - It is not necessary to wait until the calculation is complete to begin editing positions

Form Positions

Page Actions:

[Close] [Employee Changes] [Template for Vacant Salaries] [Import for Vacant Salaries] [Calculate] [Status] [Refresh]

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
1400121	SCDA	01730–IT INFO SYS AND INFR ENG	Z1400121-F10384 (0)	VACANT	1	1.00	True	$0.00	$0.00	$0.00	[Edit] [Unapprove] [Results]
1400121	SCDA	01730–IT INFO SYS AND INFR ENG	Z1400121-N10384 (0	VACANT	-1	-1.00	True	$0.00	$0.00	$0.00	[Unapprove] [Results]
1400201	SCDA	01731–IT INFO SYS AND INFR ENG	Z1400201-F10384 (0)	VACANT	1	1.00	True	$0.00	$0.00	$0.00	[Edit] [Unapprove] [Results]
1400201	SCDA	01731–IT INFO SYS AND INFR ENG	Z1400201-N10384 (0	VACANT	-1	-1.00	True	$0.00	$0.00	$0.00	[Unapprove] [Results]

Column Definitions:

➢ **Position #**: This is a budget system assigned number. It begins with the three-digit agency number and then the PCN number assigned to the position.

➢ **Approp**: The appropriation unit assigned to the position.

➢ **Job Class**: The state assigned number and title for the position.

➢ **Employee (Allocs)**: EIN system-generated number assigned to each position. Vacant position employee numbers will begin with "Z".

- A (1) is shown when 100% of the position is allocated to one fund, AU, account, project, etc. If the position is allocated in two different ways a (2) will show, etc.

➢ **Count**: Total number of positions being addressed.

➢ **FTP**: Full-Time Position refers to the specific job class or position that is being addressed (100% = 1.00)

➢ **Approval**: Status of position request approval:

- True = Approved

- False = Unapproved or not yet approved

➢ **Salary**: The salary for the position.

LUma

➢ **Benefits**: These are the calculated benefits for the position. Part-time positions will reflect 80% of the cost.

➢ **Total**: Total of the position(s).

Action Buttons:

➢ **Edit**: Allows a user to make changes to that position's salary, funding dates, and allocation settings.

- e.g. Changing a position from full-time (100% = 1.0) to part-time (50% = .50) can be made using the Edit function.

- Edits can be made at any time, even while a calculation is processing.

➢ **Unapprove**: This provides the option to unapproved a position request. When the "Unapprove" button is visible on the position line item, the position has been approved and the salary and benefit amounts will populate. Clicking this button will unapprove the position. When unapproved, the button will change to "Approve" and the salary and benefits will zero out.

➢ **Approve**: When the "approve" button is visible, the position is **not** approved and costs are zero. Salaries and benefits will only show if the position has been approved. When approving a position, be sure to click "Calculate" to approve your salaries and benefits.

Note: A position can be approved or unapproved at any time. Only approved positions will add to the PC Total on the "Detail" tab. To review the details of the position expenses, return to the "Position Tab" for a breakdown. Workers comp and DHR charges are broken out for each agency.

➢ **Results**: This button will open the "Projected Employee Results" screen. This screen provides a complete breakdown of benefit costs and salary for the position.

6. Review Salary and Benefit information for the selected positions.
   - To change these values click the **Edit** action button next to a position to open the "Edit Form Position" screen.

Projected Employee Results

Record Actions:

| Close | Export |

Fiscal Year	Benefit Code	Benefit Name	Amount
2022	DHR260	Department of Fish and Game	$141.25
2022	HEALTH	Health Insurance	$12,930.00
2022	LIFE	Life Insurance	$332.81
2022	MEDICARE	Medicare	$669.31
2022	OASDI	Social Security	$2,861.86
2022	R90	Retirement Rule of 90	$5,511.38
2022	UI	Unemployment Insurance	$226.18
2022	WC260	Fish & Game, Dept.	$1,107.82
2022	Total Benefits		$23,780.60
2022	Total Salary		$46,159.00
2022	Total		$69,939.60

Records per page: 100   -   Records: 11 - Page: |K< << 1 >> >|

Luma

Edit Form Position:

Note: Only update "Salary" tab records. Do not make changes on the "Employee" tab (position, job class, approp. unit, etc.).

> **Steps:** Select from pre-programmed salary steps:

- o   1 = Minimum within the pay grade.
- o   2 = 80% of policy (default value).
- o   3 = 100% of policy.
- o   4 = Maximum within the pay grade.

*Note:* Click the **Lookup Salary Table** button to display the salary step information.

> **Salary Override:** Check this box if the salary does not match any of the steps.

> **Override Salary:** Enter the non-step salary for the requested position (Salary Override is checked).

> **Salary/Benefit Percentage:** "Benefit Percentage" defaults to zero.

- o   If this is a fully benefitted position, change the percentage to 100%.

- o   If this is if a full-time position not taking benefits or the position is changing to part-time with no benefits, leave the default at zero.

- o   If the position is changing to a part-time position, this is where the percentages can be altered by changing the "% Full Time" to a .50 or .75. depending on what is being requested.

o The salary percentage or benefits do not need to be changed, the system will calculate the appropriate changes by changing the overall FTP status.

➢ **Manage Funding Date and Allocation Records:** If there is a change in funding dates, allocations, or benefits, click this button.

7. After all changes are made, click **Save** then click **Close** to return to the "Form Position" screen.

8. Click the **Calculate** action button to reload position data. Review the position data for accuracy and continue to edit as necessary.

Import/Export Vacant Positions:

▪ Editing positions one by one may be is effective for agencies with few vacant positions. Other agencies may prefer to utilize the Export/Import function instead.

1. Select "Vacant Positions" from the PCF tab.
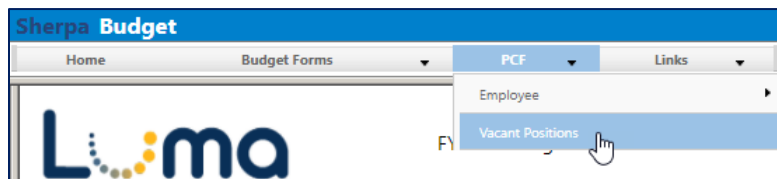
2. This report will bring up a listing of your agency's loaded vacant positions. Click **Export to XLSX** to download the list into a preformatted Excel worksheet.

3. Make any needed edits to the Annual Salary, FTP%, and Salary % (if the position is going from full-time to part-time).

• Changes can be made to the spreadsheet so long as the net dollar change is zero for Personnel Costs.

LUma

4. Navigate back to the 6300 "Form Positions" screen and click **Import for Vacant Salaries** to open the "Administrator Upload" utility.

Note: Whenever there are changes to the salary and benefits table, it may be necessary to perform a repopulation of the "Salary and Benefit Change (6200)" form, if you have already entered data on that form.

- o Changing a vacant position from Part-time to Full-time with benefits would be an enhancement to the Base Budget.
  - o Load the position "as is", not recording the change to the part-time position.
  - o Any increase to a base budget should be completed in the "Supplemental and Line Item Request (5100)" form.

Position #	Class Code	Employee Name	Annual Salary	Salary % (75 = 75%)	FTP % (50 = 50%)	Class Name
1830011	08908	VACANT	0.000000	100.000000	100.000000	RETIREMENT SPEC
1830017	01731	VACANT	0.000000	100.000000	100.000000	IT INFO SYS AND INFR ENG III
1830031	01231	VACANT	0.000000	100.000000	100.000000	ADMIN ASST 2
1830065	04248	VACANT	0.000000	100.000000	100.000000	FINANCIAL TECHNICIAN
1830069	01715	VACANT	0.000000	100.000000	100.000000	IT SOFTWARE ENGINEER II
1830077	20158	VACANT	0.000000	100.000000	100.000000	INVESTMENT OFFICER
						Reference Only. The class name will not import over.

5. Click **Browse**, find and select the Excel worksheet you edited then click **Load Selected File**. If successful, the positions will upload to the list.
    - The upload will not import the "Class Name" column on the template, it is for reference only.

6. Click the **Calculate** action button to reload position data. Review the position data for accuracy and continue to edit as necessary.

Form Positions

Page Actions:

| Close | Employee Changes | Template for Vacant Salaries | Import for Vacant Salaries | Calculate | Status | Refresh |

Enter search criteria here...

| Position # | Approp | Job Class | Employee | Name | Count | FTP | Approval | Salary | Benefits | Total | Actions |

7. If additional changes are required, click the **Edit** action button next to the position requiring edits and follow the "Edit Form Position" instructions.

Note: Agencies will need to populate this budget form. If this is not completed, the vacant positions will not appear on the PCF report.

LUma

DETAIL TAB

- The Detail tab will list the totals of the vacant position changes in salaries and benefits at the top of the screen.

- These changes should equal zero (once the salaries from the incumbents are populated) if funds are being moved around from positions.

- If there is a value other than $0 in the change column, you will need to either modify your changes or submit a supplemental or line item request using the 5100 form.

- Many agencies report "Other" adjustments such as shift differential, holiday overtime, etc. These adjustments can be added in the "Detail" tab with the **Add New** and **Copy** actions.

- Changes added on this detail tab will show in the "Other Adjustments" section of the PCF report.

   1. From the form header screen, click the "Detail" tab to open the "Budget Form Lines" screen.

   2. Create and edit adjustment lines:

- **Add New:** This button will open the "Add New Line" utility, allowing the user to manually enter a new form line.

Luma

- **Copy:** This button allows users to copy a highlighted form line, saving time and effort when new lines share previously created form line details.

- **Export/Import:** Click **Export** to download the template and any existing line information. Modify the form in Excel and save it before clicking **Import** to upload your changes.

- **Pencil Edit:** Clicking the pencil icon at the end of a form line will allow the user to make quick edits to form line fields (e.g. amount, FTP, etc.).

- **Lookup (Magnifying Glass):** Opens a contextual search utility that displays all available options for the field.

- **Comments/Notes:** Utilize this field to make notes and add additional information about a given form line as needed.

- ➤ **Approp:** Select the appropriation unit (AU) applied to this line.

- ➤ **Fund:** Select the applicable fund number for this line.

- ➤ **Program** (optional): Select a program associated with the line if your agency enters its budget with that level of detail.

- ➤ **Line #** (optional): Add a unique line number to prevent the system from combining lines that contain the same approp, fund, and account values.

- ➤ **Project** (optional)**:** Select a project associated with the line if your agency enters its budget with that level of detail.

- ➤ **OG/OT:** Designates if the line is on-going (OG) or one-time (OT).

- ➤ **Org Unit** (optional)**:** Select an organizational unit associated with the line if your agency enters its budget with that level of detail.

LUma

➢ **Comments/Notes** (optional)**:** Line-specific notes can be added to this field.

➢ **FTP Transfers:** This allows for the entering of any Full-Time Position values.

➢ **Transfer Amount:** Enter the dollar amount for the line.

➢ **Audit Text:** Comment fields, visible only on the form line audit history screen.

3. Once changes are made, click **Save All** and **Refresh** on the screen.

ATTACHMENT TAB

Selecting the "Attachment" tab will open the "Budget Form – Document Attachments" utility. Clicking **Add Files** will open a file explorer dialogue, allowing you to locate and select the document(s) you would like to upload to the form.

Note: You may upload multiple documents at once as long as they do not exceed the 50 GB file limit.

Result: You successfully reported your plan for vacant positions in the next budget year as well as any other adjustments needed..

Additional training resources can be found on the SCO website's Luma Budget Training page: https://www.sco.idaho.gov/LivePages/luma-budget-support-and-training.aspx

Date: July 12, 2021
Version 5

Luma