# Supplemental Information on Updating Position and Employee Records in wvOASIS Budget Development FY 2015



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### Updating Position and Employee Records in wvOASIS Budget Development

From the wvOASIS Budget Development Home screen, Position and Employee records are located in Salary Benefits Forecasting System (SBFS). Departments will have an opportunity to review and update position and employee records prior to having a salary projection executed to estimate the costs for the budget.

#### **Position Maintenance Table**

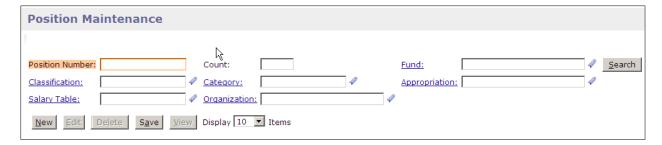
The Position Maintenance Table contains the data used to define a position in SBFS. Together, these screens contain sufficient information to make detailed projections about salary and benefit costs by position for up to sixty (60) periods. A period represents a month, a quarter, six months, or a year.

Position-related information describes the characteristics of a position regardless of who the incumbent employee is or whether the position is vacant or not. Typically, this includes information like Class, Category, Grade, and Step for a position.

#### **Position Maintenance Selection Screen**

The Position Maintenance Selection screen provides a method for State personnel to gain access to position data in SBFS. The position number established in the State's Position Information Management System (PIMS) application will be used to populate the Position Number in wvOASIS Budget Development. (4 digit department then five digit PIMS position number)

The Position Maintenance records are populated via a file extract from the State's PIMS and Payroll systems. Once the position, employee, and assignment data has been loaded to wvOASIS Budget Development and any department edits have been completed, a salary projection will be executed for all departments, funds, and appropriations that are included in the State's budget. Reports are available for departments to validate the accuracy of the data loaded. Below is the Position Maintenance search screen.



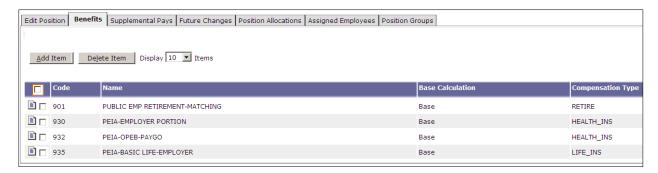
#### **Position Edit**

The Position Edit screen, which appears as the first of the Position Maintenance tabs, provides the specifics of the currently selected position. This screen will contain the basic position information, position attributes, position percentages, and home dimensions where the position is budgeted.

Edit Position	Benefits	Supplemental Pays	Future Changes	Position Allocation	ons   Assigned Employees	Position Groups					
Expand All   Collapse All											
Position Information 🗓 ———————————————————————————————————											
*Position Number: 032300017			Active:		<b>~</b>						
Name: DATABASE ADM I		TABASE ADM I	= *Posi	ition Chasifications	<i>A</i>						
*Count: 1		1	* <u>Position Classification:</u>		*Name: Databas	e Adm I					
<u>Create Date:</u> 07/01/2013		/01/2013									
Funding Start Date:			Position	Category:		<b>P</b>					
Funding End Date:			Position	<u>Grade:</u>	8302	8302					
	Г	_	Position	Step:		•					
Description:			Salary Ta	able:		<b>P</b>					
		▽	Report C	lassification:		<b>P</b>					
Return to Top											
□ Position Attributes											
Approval To F	Fill:		Military:								
Position State	us: E	4	Position Location Code:		4						
Employment '	Type: FT	4	Unemployment F	actor:	4						
Lump Sum:											
Return to Top											
	-2.1										
Position P	erceńtage:	s ———									
*FTE Amount:	: _	1									
Salary Percen	Salary Percentage: 100										
Benefit Percentage: 100											
Return to Top											
□ Hama Dim		_									
- ■ Home Dim											
Accounting Template Accounting											
Template:											
Dimension S	Set										
*Fund:		3450		deral Program:	0	<b>₽</b>					
* <u>Organizati</u>	ion:	0323-9614		b-Fund:	0	<b>₽</b>					
*Narrative F	Program:	0		b-Object:	0	4					
*Capital Pro	oject:	)		b-Revenue:	0	4					
*Primary Fu	ınd:	0		dget Fiscal Year:	2015	4					
			* <u>Ap</u>	propriation:	09900	4					

#### Position Maintenance - Benefits Tab

A Position, Employee, or Category record can have Benefit codes attached. Supplemental codes, such as the Annual Increment, are only attached to Employee Records. It is important to understand that the Category code assigned to a Position or Employee has a set of Benefits associated with it; the Category benefits are defaults used to estimate costs for new positions.

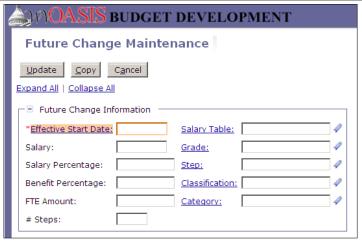


When an Employee is assigned to a Position, the Benefits that are assigned to the Employee can override the default position or category benefits as part of the Salary Projection results. The Salary Projection Maintenance table includes an employee override checkbox. When a position is vacant, the benefits and supplemental pays associated with the Category for that position are calculated.

#### Position Maintenance - Future Change Tab

The Future Change Tab provides a way to make effective dated changes to position-specific information. For example, changes to a position's Class or Salary are entered along with an effective date in this record. When the projection is executed it accounts for these changes.

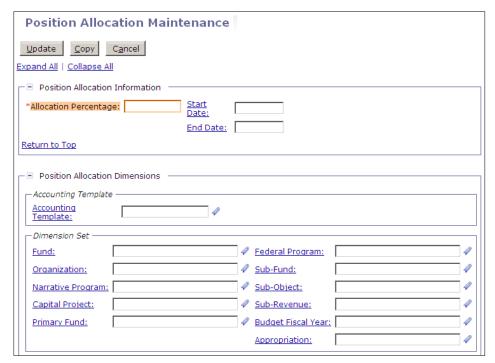




#### Position Maintenance - Allocation Tab

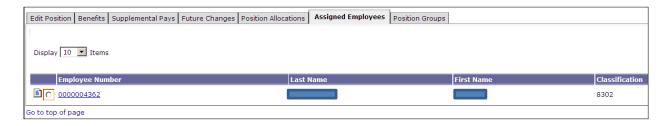
SBFS allows the State to allocate the salary and benefit costs of a position to multiple funds or units on a percentage basis through the use of the Position Allocation Tab. If no allocation is made, all salaries and benefits are charged to the home chart of account string which appears on the Position Maintenance page.





#### **Assigned Employee Tab**

The Assigned Employee tab on the Position record displays employees who are assigned to the position. The employee record can be viewed (but not edited) by clicking on the employee number link.



#### **Employee Maintenance**

The Employee Maintenance pages include information such as Employee Number, Name, Benefits, Supplemental Pays (Annual Increment), Future Changes, and Allocations. The Employee Maintenance screens look very similar to the Position Maintenance screens, and many of the fields are the same. The Employee data will override Position data when flagging employee information in the SBFS projection.

# **Employee Maintenance Search Screen**

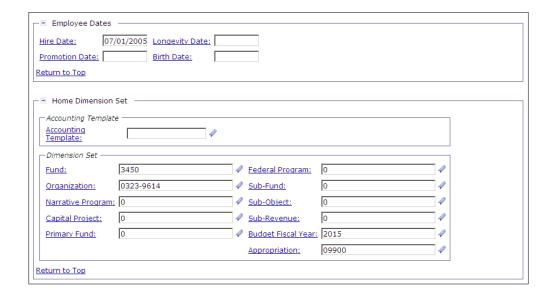
Employee Maintenance					
Employee Number:	Last Name:		Fund:	4	<u>S</u> earch
SSN:	First Name:		Appropriation:	4	
Classification:	Category:	2			
Salary Table:	Organization:	4			
New Edit Delete Save View	Display 10 🔽 Items				

# **Edit Employee**

The Employee Maintenance page includes detailed information about the employee. Actual employee information, including employee number (system generated), name, and dates such as hire date are included on this screen.

The data on the employee records is populated initially through a file upload, but when an employee record is selected, the information displayed below can be viewed and edited.

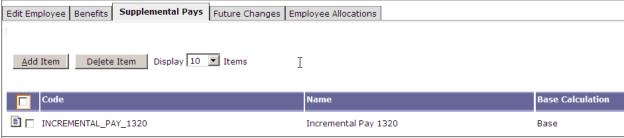
Edit Employee	Benefits   Supplemental Pays   Future Changes   Employee Allocations							
I Expand All   Collapse All								
■ Employee Information []								
*Employee Number:	0000004362 Active:							
First Name:	*Employee Classification: #							
Middle Initial:	*Code: 8302 *Name: Database Adm I							
Last Name:								
Description:	Employee Step:  Employee Grade:  Employee Category:							
Return to Top								
Employee Attributes  Salary Table:  SSN:  Current Salary Amount:  Age Of Entry:  FTE Amount:  Return to Top								



## **Employee Maintenance – Benefits and Supplemental Tabs**

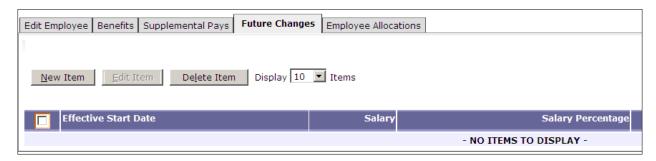
The employee-specific benefits and supplemental pays (annual increment) are accessed through the Benefits & Supplemental Pays tabs of the Employee Maintenance page. An example of Employee Benefits is displayed below.

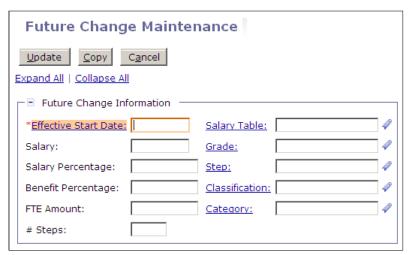




## **Employee Maintenance - Future Change Tab**

The Future Change Tab provides a way to make effective dated changes to employee-specific information. For instance, changes to an employee's Classification or Salary are entered on this screen, along with an effective date, and accounted for when SBFS projections are calculated.

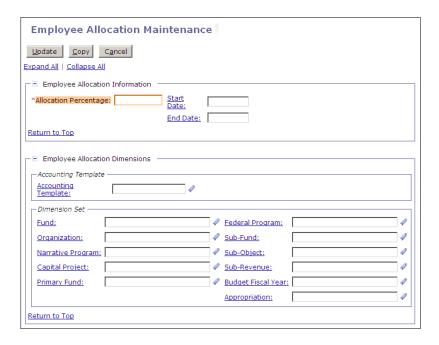




## **Employee Maintenance - Allocation Tab**

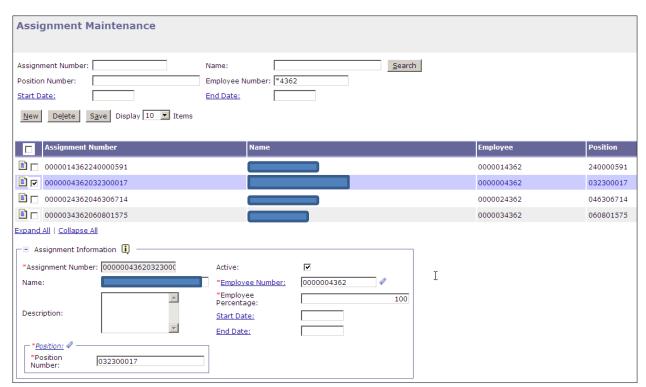
SBFS also allows the State to allocate the salary and benefit costs of an employee similar to that of a Position. In the situation where an incumbent of a Position has a different allocation or labor distribution than that set up for a Position, the employee allocation will override what is defined on the Position.





## **Employee Assignment Table**

The Employee Assignment Table joins employees with positions. These relationships will be loaded into SBFS from PIMS. Departments should not generally need to edit the Assignment records. The Assignment Number will be the Employee Number and Position Number combined. Any established position that does not have an employee assigned to it will be identified as 'Vacant' for budgeting purposes. In this case, position information along with Category defaults will determine Salaries and Benefits to be used in the Salary Projection.



## **Salary Projections**

SBFS estimates salary and benefit costs through the use of Salary Projections. Based on the accuracy of the data loaded to wvOASIS Budget Development, SBFS projections can estimate costs with a high degree of accuracy. Once departments have updated any position or employee records that need to be edited, the wvOASIS Budget Development Administrator will execute a Statewide salary projection that will be used for the upcoming budget.