

**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.

The screenshot shows a web interface titled "Position Maintenance". It features several search criteria fields: "Position Number" (highlighted in orange), "Count", "Fund", "Classification", "Category", "Appropriation", "Salary Table", and "Organization". Each field has a small blue pencil icon next to it. A "Search" button is located to the right of the "Fund" field. At the bottom of the form, there are buttons for "New", "Edit", "Delete", "Save", and "View", followed by a "Display" dropdown menu set to "10" and the text "Items".

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 Allocations	Assigned Employees	Position Groups
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[Expand All](#) | [Collapse All](#)

Position Information ⓘ

*Position Number: 032300017	Active: <input checked="" type="checkbox"/>
Name: DATABASE ADM I	*Position Classification: ⓘ
*Count: 1	*Code: 8302 *Name: Database Adm I
Create Date: 07/01/2013	Position Category: ⓘ
Funding Start Date: ⓘ	Position Grade: 8302 ⓘ
Funding End Date: ⓘ	Position Step: ⓘ
Description: ⓘ	Salary Table: ⓘ
	Report Classification: ⓘ

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Position Attributes

Approval To Fill: <input checked="" type="checkbox"/>	Military: <input type="checkbox"/>
Position Status: E ⓘ	Position Location Code: ⓘ
Employment Type: FT ⓘ	Unemployment Factor: ⓘ
Lump Sum: ⓘ	Current Salary Amount: 54,648

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Position Percentages

*FTE Amount: 1
Salary Percentage: 100
Benefit Percentage: 100

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Home Dimension Set

Accounting Template

Accounting Template: ⓘ

Dimension Set

*Fund: 3450 ⓘ	*Federal Program: 0 ⓘ
*Organization: 0323-9614 ⓘ	*Sub-Fund: 0 ⓘ
*Narrative Program: 0 ⓘ	*Sub-Object: 0 ⓘ
*Capital Project: 0 ⓘ	*Sub-Revenue: 0 ⓘ
*Primary Fund: 0 ⓘ	*Budget Fiscal Year: 2015 ⓘ
	*Appropriation: 09900 ⓘ

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.

Edit Position Benefits Supplemental Pays Future Changes Position Allocations Assigned Employees Position Groups				
<input type="button" value="Add Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items				
<input type="checkbox"/>	Code	Name	Base Calculation	Compensation Type
<input type="checkbox"/>	901	PUBLIC EMP RETIREMENT-MATCHING	Base	RETIRE
<input type="checkbox"/>	930	PEIA-EMPLOYER PORTION	Base	HEALTH_INS
<input type="checkbox"/>	932	PEIA-OPEB-PAYGO	Base	HEALTH_INS
<input type="checkbox"/>	935	PEIA-BASIC LIFE-EMPLOYER	Base	LIFE_INS

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.

Edit Position Benefits Supplemental Pays Future Changes Position Allocations Assigned Employees Position Groups				
<input type="button" value="New Item"/> <input type="button" value="Edit Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items				
<input type="checkbox"/>	Effective Start Date	Salary	Salary Percentage	
- NO ITEMS TO DISPLAY -				

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OASIS BUDGET DEVELOPMENT

Future Change Maintenance

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Future Change Information

*Effective Start Date: <input type="text"/>	Salary Table: <input type="text"/>
Salary: <input type="text"/>	Grade: <input type="text"/>
Salary Percentage: <input type="text"/>	Step: <input type="text"/>
Benefit Percentage: <input type="text"/>	Classification: <input type="text"/>
FTE Amount: <input type="text"/>	Category: <input type="text"/>
# Steps: <input type="text"/>	

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.

Edit Position	Benefits	Supplemental Pays	Future Changes	Position Allocations	Assigned Employees	Position Groups
<p> <input type="button" value="New Item"/> <input type="button" value="Edit Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items </p>						
<input type="checkbox"/>	Allocation Percentage	Start Date	End Date	Organization	Fund	
- NO ITEMS TO DISPLAY -						

Position Allocation Maintenance

[Expand All](#) | [Collapse All](#)

Position Allocation Information

*Allocation Percentage:
 Start Date:
 End Date:

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Position Allocation Dimensions

Accounting Template:

Dimension Set:

Fund:	<input type="text"/>	Federal Program:	<input type="text"/>
Organization:	<input type="text"/>	Sub-Fund:	<input type="text"/>
Narrative Program:	<input type="text"/>	Sub-Object:	<input type="text"/>
Capital Project:	<input type="text"/>	Sub-Revenue:	<input type="text"/>
Primary Fund:	<input type="text"/>	Budget Fiscal Year:	<input type="text"/>
		Appropriation:	<input type="text"/>

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.

Edit Position	Benefits	Supplemental Pays	Future Changes	Position Allocations	Assigned Employees	Position Groups
<p>Display <input type="text" value="10"/> Items</p>						
	Employee Number	Last Name	First Name	Classification		
	0000004362	<input type="text"/>	<input type="text"/>	8302		
Go to top of page						

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: [Search](#)

SSN: First Name: Appropriation:

Classification: [Category](#):

Salary Table: [Organization](#):

[New](#) [Edit](#) [Delete](#) [Save](#) [View](#) Display 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: Active:

First Name: *Employee Classification:

Middle Initial: *Code: *Name:

Last Name:

Description:

Employee Step:

Employee Grade:

Employee Category:

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Employee Attributes

Salary Table: [Employee Location Code](#):

SSN: Current Salary Amount:

Age Of Entry: FTE Amount:

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Employee Dates

Hire Date: Longevity Date:

Promotion Date: Birth Date:

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Home Dimension Set

Accounting Template

Accounting Template:

Dimension Set

Fund:	<input type="text" value="3450"/>	Federal Program:	<input type="text" value="0"/>
Organization:	<input type="text" value="0323-9614"/>	Sub-Fund:	<input type="text" value="0"/>
Narrative Program:	<input type="text" value="0"/>	Sub-Object:	<input type="text" value="0"/>
Capital Project:	<input type="text" value="0"/>	Sub-Revenue:	<input type="text" value="0"/>
Primary Fund:	<input type="text" value="0"/>	Budget Fiscal Year:	<input type="text" value="2015"/>
		Appropriation:	<input type="text" value="09900"/>

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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.

Edit Employee	Benefits	Supplemental Pays	Future Changes	Employee Allocations
I				
<input type="button" value="Add Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items				
Code	Name	Base Calculation	Compensation Type	
<input type="checkbox"/> 901	PUBLIC EMP RETIREMENT-MATCHING	Base	RETIRE	
<input type="checkbox"/> 930	PEIA-EMPLOYER PORTION	Base	HEALTH_INS	
<input type="checkbox"/> 932	PEIA-OPEB-PAYGO	Base	HEALTH_INS	
<input type="checkbox"/> 935	PEIA-BASIC LIFE-EMPLOYER	Base	LIFE_INS	
<input type="checkbox"/> PEIA-FEES	PEIA FEES FOR ADMINISTRATION	Base		

Edit Employee	Benefits	Supplemental Pays	Future Changes	Employee Allocations
I				
<input type="button" value="Add Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items				
Code	Name	Base Calculation		
<input type="checkbox"/> INCREMENTAL_PAY_1320	Incremental Pay 1320	Base		

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.

Edit Employee	Benefits	Supplemental Pays	Future Changes	Employee Allocations
<input type="button" value="New Item"/> <input type="button" value="Edit Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items				
<input type="checkbox"/>	Effective Start Date		Salary	Salary Percentage
- NO ITEMS TO DISPLAY -				

Future Change Maintenance

[Expand All](#) | [Collapse All](#)

Future Change Information

*Effective Start Date:	<input type="text"/>	Salary Table:	<input type="text"/>
Salary:	<input type="text"/>	Grade:	<input type="text"/>
Salary Percentage:	<input type="text"/>	Step:	<input type="text"/>
Benefit Percentage:	<input type="text"/>	Classification:	<input type="text"/>
FTE Amount:	<input type="text"/>	Category:	<input type="text"/>
# Steps:	<input type="text"/>		

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.

Edit Employee	Benefits	Supplemental Pays	Future Changes	Employee Allocations
<input type="button" value="New Item"/> <input type="button" value="Edit Item"/> <input type="button" value="Delete Item"/> Display <input type="text" value="10"/> Items				
<input type="checkbox"/>	Allocation Percentage	Start Date	End Date	Organization
- NO ITEMS TO DISPLAY -				

Employee Allocation Maintenance

[Expand All](#) | [Collapse All](#)

Employee Allocation Information

*Allocation Percentage: Start Date:

End Date:

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Employee Allocation Dimensions

Accounting Template

Accounting Template:

Dimension Set

Fund:	<input type="text"/>	Federal Program:	<input type="text"/>
Organization:	<input type="text"/>	Sub-Fund:	<input type="text"/>
Narrative Program:	<input type="text"/>	Sub-Object:	<input type="text"/>
Capital Project:	<input type="text"/>	Sub-Revenue:	<input type="text"/>
Primary Fund:	<input type="text"/>	Budget Fiscal Year:	<input type="text"/>
		Appropriation:	<input type="text"/>

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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.

Assignment Maintenance

Assignment Number: Name:

Position Number: Employee Number:

Start Date: End Date:

Display Items

	Assignment Number	Name	Employee	Position
<input type="checkbox"/>	0000014362240000591		0000014362	240000591
<input checked="" type="checkbox"/>	0000004362032300017		0000004362	032300017
<input type="checkbox"/>	0000024362046306714		0000024362	046306714
<input type="checkbox"/>	0000034362060801575		0000034362	060801575

[Expand All](#) | [Collapse All](#)

Assignment Information

*Assignment Number: Active:

Name: *Employee Number:

Description: *Employee Percentage:

Start Date:
End Date:

*Position:

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.