

Salary Planner
Budget Profile Code Verification Instructions
April 2017

The Position Budget Profile codes in Banner are an essential part of the Salary Planner process. Budget Profile codes on the Banner form NBAPBUD are equivalent to the Budget Reference Code in the legacy system and will determine which positions are pulled into the HR Salary Planner.

Units are required to keep this code up-to-date for new and modified positions. Valid Codes include:

- X – Not Budgeted
- R – Recurring State or ICR Funds
- N – Non-Recurring State Funds (this code can only be used with FOAPALs that are equivalent to legacy Ledger 1 funds)
- B – Self-supporting, Grant or MSP/DSP funds
- RO – Civil Service Open Range, Recurring State or ICR Funds
- NO – Civil Service Open Range, Non-Recurring State Funds
- BO – Civil Service Open Range, Self-supporting, Grant or MSP/DSP Funds
- V – Visiting Academic Professional

Note: Some positions will appear on the Verification Report with a Budget Profile code of “M” indicating multi-funds. This code was derived from the Banner conversion process when two or more appointments with different budget reference codes were consolidated into one position. These positions will need to be updated via the HR Front End with the appropriate Budget Profile code to be included in the Salary Planner extract.

Positions will be selected for extraction in the Salary Planner tool based upon the following criteria:

- Civil Service Open Range positions. (Established, prevailing, negotiated, student and extra help employees will be *excluded* from the extract.)
- Academic positions. (Academic unpaid, retiree, and graduate hourly employees will be *excluded* from the extract.)
- Active positions with designated Budget Profile codes (R, B, N, RO, BO, NO, V), including vacant positions and positions with associated visiting jobs.
- Positions with effective dates of 8/16/17 for Academic positions and 8/27/17 for Civil Service positions. Any positions with end dates prior to these effective dates will not be included.

Note: Pooled positions will **not** be included.

Only jobs associated with a selected position will be extracted from Banner to the Salary Planner. Jobs will be selected for extraction to the Salary Planner tool based upon the following criteria:

- Active jobs with effective dates of 8/16/17 for Academics and 8/27/17 for Civil Service Open Range.
- Primary or secondary jobs will be selected if the date criteria are met.

Note: One-time payments, summer pay, and lump sum payments will be excluded.

Verification Instructions

To verify Budget Profile information for positions, you will need to access the Position budget Profile Code Audit report located at <http://www.hr.uillinois.edu/cms/One.aspx?portalId=964839&pageId=1078865>. This report shows all Academic and Civil Service Open Range positions established for your unit that meet the e-class selection criteria for inclusion in the Budget process. (See previous page of instructions for exclusions.)

The report is in Excel format, sorted by chart of account and position organization. Within each organization, records are sorted by position E-Class code.

Upon accessing the report, review for accuracy. If discrepancies are found in position or job data, normal processing procedures (i.e. HR Front end transaction) should be used for submitting necessary changes to Banner. See the [instructions below](#) for changing the Budget Profile Code via the HR Front End. For positions and jobs to be reflected accurately in the “practice” extract that will be available on May 8, 2017, changes must be made by May 5, 2017 at 5:00 PM. For positions and jobs to be reflected accurately in the “production” extract of the Salary Planner, changes must be submitted before the production extracts are run. Production extracts are scheduled to be available on June 27, 2017.

Tips for Reviewing the Verification Report:

General

- The report is refreshed on demand and reflects information in Banner as of the date you extract the report. Any information entered into Banner after that date will not be represented in the report.
- Academic position updates should be completed by units by submitting and HR Front End transaction. Civil Service positions updates require completion of the Position Requisition form and submittal to HR.

Position Verification

- Verify that the correct Budget Profile code is assigned to positions. Any position that has a designated Budget Profile code of “M” from the conversion will need to have the Budget Profile code corrected manually. Any position not assigned a Budget Profile code should be assigned a valid Budget Profile code from the list on the first page of these instructions.

- Inactive positions will not be included in the report. If there is a position missing that you believe should be included, verify that the position status is changed to active. Only active positions either vacation or filled, are included on the report.
- The position effective date should be prior to or equal to 8/16/2017 for Academic and 8/27/2017 for Civil Service Open Range. Check the position begin date field on the report for each position to make sure it falls within this range.
- If a position has an end date on the report, and that position should be included in the Salary Planner extract, then the position end date will need to be removed via an HR Front End transaction.

Job Verification

- The job effective date should be prior to 8/16/2017 for Academic and 8/27/2017 for Civil Service Open Range. Check the job effective date field on the report for each position to make sure it falls prior to these dates.
- The job should not have an end date prior to 8/16/2017 for Academics or 8/27/17 for Open Range. If the end date showing for the job on the report is prior to this date, the job will need to be extended to appear in the Extract.

Contact Information and Additional Resources

Frequently Asked Questions about the Salary Planner process may be found in at https://nessie.uihr.uillinois.edu/pdf/banner/SP_faq.pdf.

Your central Human Resources and/or Academic offices are available to answer your questions.

UIC	<p>Academics and Civil Service UICHR Help Desk at uichrhelpdesk@uillinois.edu or (312) 413-4848</p> <p>Faculty Faculty Affairs HR, facultyisp@uic.edu or (312) 355-2412</p>
UIS	<p>Melanie Trimm at msmit2@uillinois.edu or (217) 206-7078</p> <p>Natalie Taylor ntayl1@uis.edu or (217) 206-6616</p>
UIUC	<p>Academics Doug Lamb at dougl@uillinois.edu or (217) 244-2400</p> <p>Civil Service Robbie Witt at rswitt@uillinois.edu or (217) 333-2136</p>
System Offices	<p>Melissa McMullen at msstein@uillinois.edu or (217) 333-5233</p>

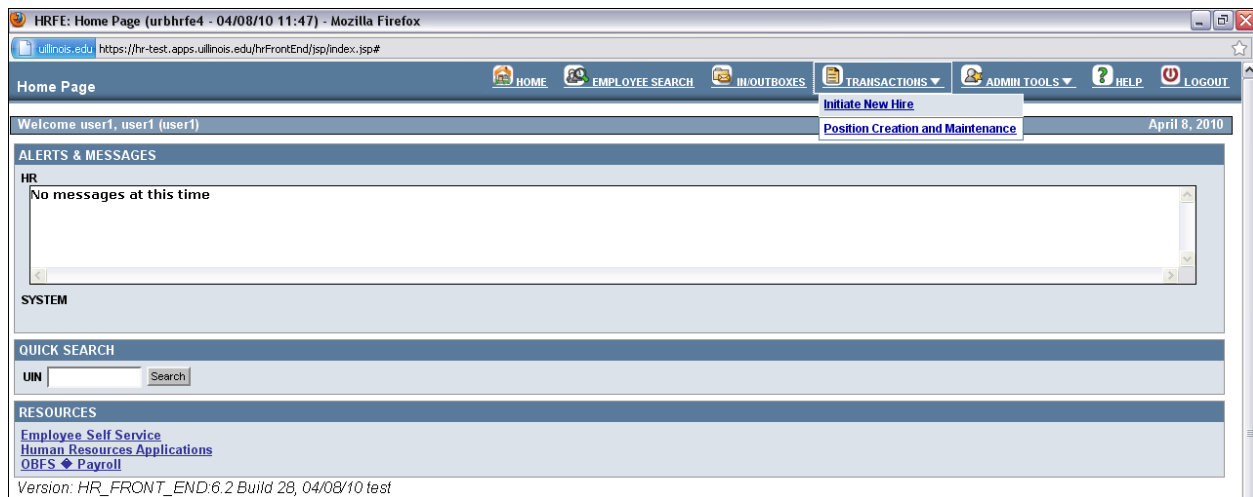
Salary Planner – Changing Budget Profile Code in HR Front End

A Position Creation and Maintenance (PCM) transaction in the HR Front End gives you the ability to create a new position or maintain an existing position. You will need to maintain an existing position in order to change the Budget Profile Code for Salary Planner.

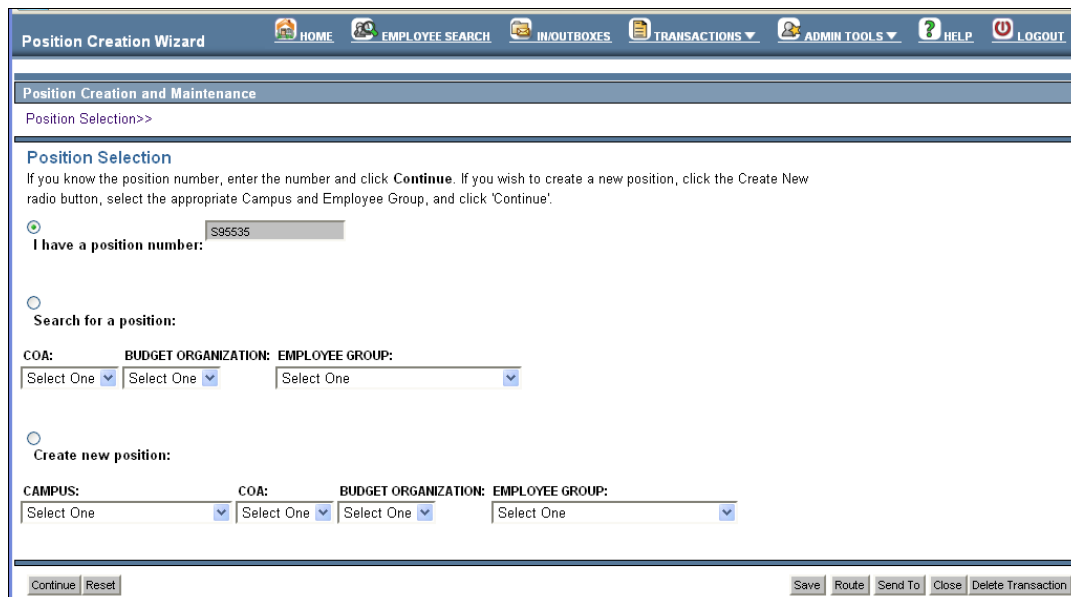
NOTE: If the Budget Profile Code needs to be changed on a single, FILLED position, you will be prompted to go to the incumbent's Employee Record View. From there you would complete the transaction as an **Employee Job Record Change**. It is quickest to begin an [Employee Job Record Change](#) directly from the **Employee Record View** of the incumbent in this situation.

This Job Aid shows steps for maintaining the position through the PCM transaction as well as maintaining the position through an Employee Job Record Change transaction.

Maintain the Position Using PCM

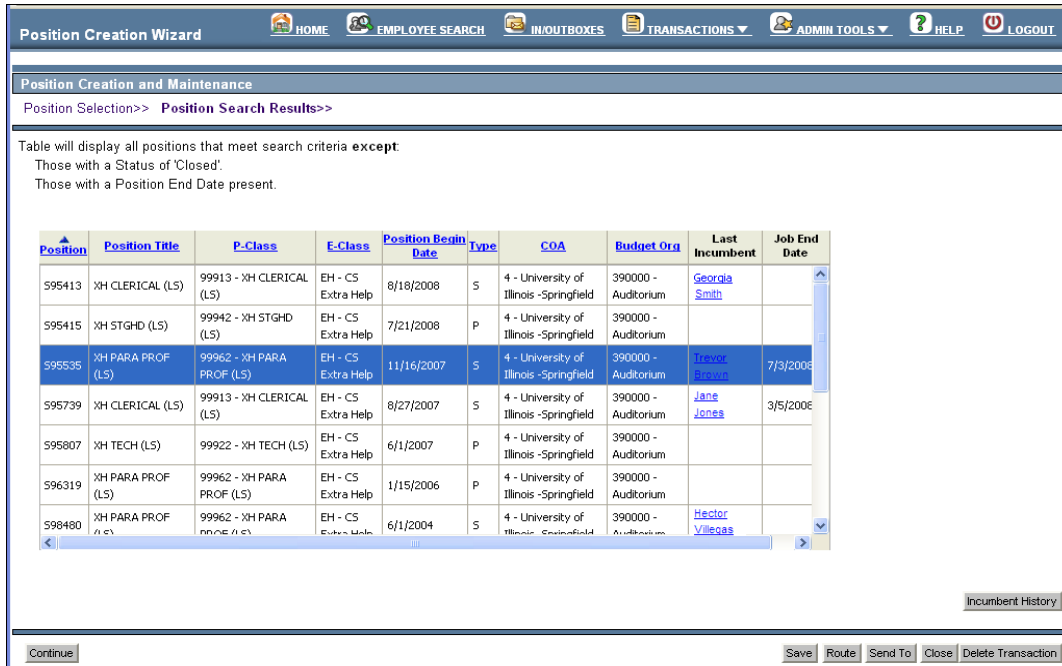


1. From the **Transactions** menu, select **Position Creation and Maintenance**. *The **Position Selection** screen will appear where you can select the position you wish to maintain.*

A screenshot of the "Position Creation Wizard" screen, specifically the "Position Selection" step. The page title is "Position Creation Wizard" and the breadcrumb is "Position Creation and Maintenance > Position Selection>>". The main heading is "Position Selection". Below the heading, there is a paragraph: "If you know the position number, enter the number and click **Continue**. If you wish to create a new position, click the Create New radio button, select the appropriate Campus and Employee Group, and click 'Continue'." There are two radio buttons: "I have a position number:" (selected) and "Search for a position:". Under "I have a position number:", there is a text input field containing "S95535". Under "Search for a position:", there are three dropdown menus: "COA:" (Select One), "BUDGET ORGANIZATION:" (Select One), and "EMPLOYEE GROUP:" (Select One). Under "Create new position:", there are four dropdown menus: "CAMPUS:" (Select One), "COA:" (Select One), "BUDGET ORGANIZATION:" (Select One), and "EMPLOYEE GROUP:" (Select One). At the bottom left, there are "Continue" and "Reset" buttons. At the bottom right, there are "Save", "Route", "Send To", "Close", and "Delete Transaction" buttons.

2. From the **Position Selection** screen, choose one of the following options:

- a. If you know the position number, select **I have a position number**. Type the position number in the field and click **Continue**. *The **Position Data** Screen appears.*
- b. If you do not know the position number, select **Search for a position**. Choose a COA, Budget Organization, and Employee Group from the drop-down lists and click **Continue**. *The **Position Search Results** screen appears.*



c. Select the appropriate position from the generated list of positions and click **Continue**. *The **Position Data** screen appears.*

d. To maintain a single FILLED position, click the incumbent's name in the **Last Incumbent** column. Maintenance of single filled positions requires an Employee Job Record Change transaction (see steps for maintaining the position via Employee Job Record Change below)

*The incumbent's **Employee Record View** displays.*

Editing Position Data: Position Data screen

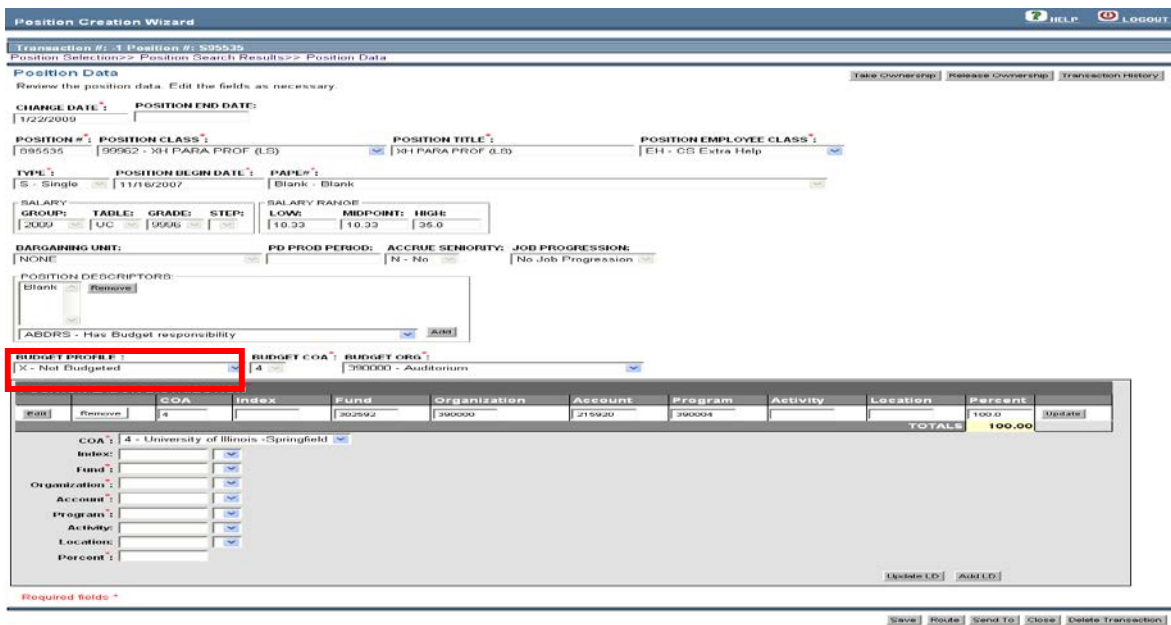


Figure 1: Position Data screen

3. Edit the **Budget Profile** field. If applicable, add or edit values in additional editable fields.

Once you complete the **Position Data** screen, the transaction is ready to be routed and applied to Banner

Maintain the Position Using Employee Job Record Change

If the Budget Profile Code needs to be maintained on a single, filled position, the change must be completed through an **Employee Job Record Change** transaction. This change can be initiated from the Employee Record View (ERV) one of two ways:

- Via the **Position Creation and Maintenance** transaction by clicking the incumbent's name in the **Last Incumbent** column of the Position Search Results screen (see step 2 d above).
- By searching for the Employee using the Employee Search feature.

Employee Record View screen

The screenshot displays the Employee Record View (ERV) interface. At the top, there is a navigation bar with options like HOME, EMPLOYEE SEARCH, IN/OUTBOXES, TRANSACTIONS, ADMIN TOOLS, HELP, and LOGOUT. Below this, the employee's name and ID are shown: Wood, Tanya Smith (654248290). The main content area is divided into several sections: GENERAL INFO, BIO / DEMO, MEMOS, ATTACHMENTS, and AUDIT TRAIL. The POSITION DATA section is expanded, showing fields for CHANGE DATE (12/7/2007), POSITION # (U81177), POSITION CLASS (RALHA - COORD HR TRNPD), POSITION TITLE (TRAINING PROG COORD), POSITION EMPLOYEE CLASS (BA - Acad/Pro 12mth Ben Elig), TYPE (S - Single), POSITION BEGIN DATE (7/1/2003), PAPE # (49919 - COORDINATOR), SALARY RANGE (LOW: 1.0, MID: 1.0, HIGH: 999999.0), BARGAINING UNIT (NONE), PROB PERIOD, ACCRUE SENIORITY (N - No), and JOB PROGRESSION (No Job Progression). The BUDGET PROFILE field is highlighted with a red box and shows 'R - Recurring'. Below the POSITION DATA section is the POSITION LABOR DISTRIBUTION table.

COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent
9		100010	904000	211300	904003			100.0

2. Once in the **Employee Record View** (ERV), choose **Employee Job Record Change** from the **Transactions** menu. *You will then be able to edit job and position data.*

3. Expand the **Position Data** accordion and change the **Budget Profile** code.

4. Click **Save** at the bottom of the page. *The transaction is then ready to be routed and applied to Banner.*