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project | **e** **N** **C** **O** **r** **e**
PERFORMANCE INFORMED BUDGETING

Position Budgeting

AGENDA

- Opening Remarks
- Position Budgeting
- Task Lists
- Review the Position Details
- Manage the Existing Positions
- Transfer Existing Employees
- Create a New Position
- Compensation and Allocation Calculations
- Manage Approvals
- Review Compensation and FTE
- Mass Update of the Element Values
- Assign Segments for Percentage Allocations
- Closing Remarks and Questions

POSITION BUDGETING

- No more Form 47s!
- Pull Position and Employee data from PeopleSoft HCM
 - **Position data** – vacant positions
 - **Employee** – current incumbent
 - **Benefit** – ability to see the ‘budgeted’ (position) information as well as the ‘actual’ (incumbent) information

COMPENSATION INFORMATION

- Compensation information from HCM includes: **salary, benefit allowance, SoonerSave, and retirement information**
 - **Salary** will include basic compensation plus some additional pay.
 - **For VACANT positions**, OMES will select a default value (salaries, health benefits, etc.) and then the agency will have the ability to override.
 - **For some information**, i.e. overtime, the agency will be able to budget a total dollar amount.

DATA CLEAN-UP

- Initial clean-up should be done in HCM by 6/30/2014
- Inactivate unused positions
 - If position has not been filled within the last year, then the agency should inactivate the position.
- One employee per position
 - Some exceptions: seasonal, temps, National Guard
 - Enhances abilities for budget to actual comparisons
- Queries will be provided

TASKLIST

Login as JPosa – an HCP user who will prepare the Budget for FY16

User Name:

JPosa

Password:

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Log On



ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Check the tasks and associated instructions assigned to the JPosa

SOKPLAN1 - Task List Status ✕

Task List Status

Task List Status - Position Budget Preparation View ▾

Status of all Task Lists



Task List Tasks - Position Budget Preparation

Task	Type	Status	Due Date	Alert	Completed Date	Instructions	Action
[-] Position Budget Preparation							
[-] Review the Position Employee Data						∞	
[-] Manage All Positions							
[-] Create new position and assign FTE						∞	
[-] Manage Assignments						∞	
[-] Manage Position-Employee Assignments							
[-] Find and Assign Defaults							
[-] Manage Pending Transfers						∞	
[-] Calculate compensation budgets						∞	
[-] Allocate compensation to general ledger accounts							
[-] Review entity compensation budgets						∞	
[-] Review position budgets						∞	
[-] Review Employee Budget						∞	
[-] Review element budgets						∞	
[-] Review FTE assignments							
[-] Manage Approvals						∞	

TASKLIST

Review all positions

Task - Review the Position Employee Data-View Position and Employee Assignments Task Instructions

Current Year of View: FY16

Current Scenario: Budget

Current Stage: Stage 1

Position's Employee Assignments Employee's Position Assignments

09000_1000001 - Administration

			Job	Position Type	Employee	Pay Type	Position Start Date	Hire Date	Location Code
EP09000009 - Certified Public Accountant	EE100007		JC0026 - Clerk II	Single Incumbent	Regular	Exempt	6/1/07	10/31/03	VACANT - University Center at PoncaCity
EP09000185 - Executive Fellow	EE100034		JC0143 - Violence Prevention Proj Coord	Single Incumbent	Hourly	Non-exempt	7/1/06	11/5/03	HUMRES - Office of State Finance
EP09000183 - Administrative Officer	EE100030		JC0120 - Exec Secty to the Director	Single Incumbent	Regular	Non-exempt	2/26/05	8/21/01	ADMN - Office of State Finance
EP09000094 - Budget Analyst II	EE106844		JC0142 - College Student Wrk Study Prog	Single Incumbent	Regular	Non-exempt	4/1/06	11/5/03	VACANT - University Center at PoncaCity
EP09000105 - Coordinator	EE111398		JC0139 - Centrex Supervisor	Single Incumbent	Regular	Non-exempt	3/1/06	11/5/06	BUDGET - Office of State Finance
EP09000213 - Temporary	EE100024		JC0107 - Supervisor Clerical Unit	Shared	Hourly	Exempt	11/1/09	1/24/05	DCARTP
EP09000048 - Certified Public Accountant I	EE100039		JC0180 - Exec Secty Aeronautics Comm	Single Incumbent	Temporar	Non-exempt	7/1/08	10/31/03	DCARAR
EP09000135 - Accountant	EE100042		JC0221 - Legal Secretary II	Shared	Regular	Non-exempt	5/1/12	11/5/03	DCARAR
EP09000177 - Temporary	EE100035		JC0164 - State Treasurers Acct Clk III	Shared	Hourly	Exempt	2/20/07	8/21/01	DCARAR
EP09000093 - Pre	EE100002		JC0005 - Medical Resident	Single Incumbent	Temporar	Non-exempt	2/26/05	11/5/03	DCARTP
EP09000097 - Accounts Payable Technician	EE100010		JC0043 - Evaluations Assistant	Single Incumbent	Regular	Non-exempt	12/1/09	11/5/06	DCARTP
EP09000006 - Information Sys Planning Spec	EE100044		JC0241 - Accounting Assistant III	Single Incumbent	Temporar	Non-exempt	6/30/13	1/24/05	ISDCORE
EP09000024 - Senior Programmer Analyst	EE143543		JC1809 - Deputy Administrator	Single Incumbent	Regular	Non-exempt	1/1/05	10/31/03	PD - Office of State Finance
EP09000101 - Computer Analyst/Programmer	EE100003		JC0006 - Secretary of the Commission	Single Incumbent	Regular	Non-exempt	3/1/05	11/5/03	VACANT - University Center at PoncaCity
EP09000143 - Specialist	EE100022		JC0101 - Administrative Secretary III	Single Incumbent	Regular	Non-exempt	7/1/08	8/21/01	ISDCORE
EP09000221 - Special Projects Manager II	EE143685		JC0101 - Administrative Secretary III	Single Incumbent	Regular	Non-exempt	7/1/08	11/5/03	ISDCORE
EP09000241 - Application Administrator	EE100052		JC1810 - Exec Secty Dept of Education	Single Incumbent	Regular	Non-exempt	4/1/05	11/5/06	VACANT - University Center at PoncaCity
EP09000133 - Chief Information Officer	EE100048		JC0745 - Microcomputer & Network Mgr	Single Incumbent	Regular	Non-exempt	6/1/06	1/24/05	ISDNG

Manage all positions

Position Details – FTE

Task - Manage All Positions-Manage All Positions Task Instructions

Manage All Positions > Manage Position Details

Entity: 09000_1000001 - Administration

Position Details

General Employee **FTE** Status Changes Salary Grades Additional Earnings

Current Service Level	1st Assignment	Proposed FTE	FTE Start Date	FTE End Date
		1	1/1/05	

Position Details – Status Changes

Task - Manage All Positions-Manage All Positions Task Instructions

Manage All Positions > Manage Position Details

Entity: 09000_1000001 - Administration

Position Details

General Employee FTE **Status Changes** Salary Grades Additional Earnings

Current Service Level	1st Assignment	Action	Assignment Start Date	Assignment End Date
		Active	1/1/05	

Manage all positions

Position Details – Salary Grades

Task - Manage All Positions-**Manage All Positions** Task Instructions

Manage All Positions > Manage Position Details

Entity: 09000_1000001 - Administration Position: EP09000024 - Senior Programmer Analyst

Position Details

General Employee FTE Status Changes **Salary Grades** Additional Earnings Benefits Tax Details Allocations

Employee: Vacancy

Current Service Level	CLAS-M	1st Element Change	Salary Grade Type	Grade Salary Basis	Option Value	Option Start Date	Option End Date	Allows Value Change	Override Option Value
			Grade Rate	Annual	51846	1/1/05		Yes	51846

Position Details – Additional Earnings

Task - Manage All Positions-**Manage All Positions** Task Instructions

Manage All Positions > Manage Position Details

Entity: 09000_1000001 - Administration Position: EP09000024 - Senior Programmer Analyst Current Year of View: FY16

Position Details

General Employee FTE Status Changes Salary Grades **Additional Earnings** Benefits Tax Details Allocations

Employee: Vacancy

Current Service Level	Options	Taxable	Payment Frequency	Payment Terms	Option Value	Override Option Value	Option Start Date	Option End Date	Earning Type	Value Type	Allows Value Change
CEL - Cellular Phone Usage	Employee	No	Pay During First Period	Monthly (Fiscal Year)	15	15	7/1/07			Amount	No
VEH - Vehicle Usage \$3.00	Employee	No	Pay During First Period	Monthly (Fiscal Year)	3	3	7/1/07			Amount	No

Manage all positions

Position Details – Benefits

Task - Manage All Positions-Manage All Positions												Task Instructions	
Manage All Positions > Manage Position Details						Entity: 09000_1000001 - Administration			Position: EP09000024 - Senior Programmer Analyst			Current Year of View: FY16	
Position Details													
General	Employee	FTE	Status Changes	Salary Grades	Additional Earnings	Benefits	Tax Details	Allocations					
Employee: Vacancy													
Current Se	Options	Taxable	Payment Frequency	Payment Terms	Option Value	Override Option Val	Option Start Date	Option End Date	Value Type	Allows Value Chang			
BEA - Medical Allowances	1st Element Change	Employee	No	Pay During First Pe	Monthly (Fiscal Yea	640.98	640.98	7/1/07	Amount	No			
RTP - Retirement Pay	1st Element Change	Employee	No	Pay During First Pe	Monthly (Fiscal Yea	300	300	7/1/07	Amount	No			

Position Details – Tax Details

Task - Manage All Positions-Manage All Positions												Task Instructions	
Manage All Positions > Manage Position Details						Entity: 09000_1000001 - Administration			Position: EP09000024 - Senior Programmer Analyst			Current Year of View: FY16	
Position Details													
General	Employee	FTE	Status Changes	Salary Grades	Additional Earnings	Benefits	Tax Details	Allocations					
Employee: Vacancy													
Current S	Payment Frequency	Payment Terms	Option Value	Override Option Val	Option Start Date	Option End Date	Value Type	Allows Value Chang					
Federal Insurance Contributions Act - FICA	1st Element Change	Pay During First Period	Monthly (Fiscal Year)	6.2	6.2	7/1/07	Percentage of Taxable Earnings	No					

Manage all positions

Position Details – Allocations

Task - Manage All Positions-Manage All Positions Task Instructions

Manage All Positions > Manage Position Details > Manage Employee Details

Entity: 09000_1000001 - Administration Employee: EE143543 - Blackwell, Dedra A Position: EP09000024 - Senior Programmer Analyst Context Request: Current Service Level Current Year of View: FY16

Employee Details

General Position Details FTE Status Changes Salary Grades Additional Earnings Benefits Tax Details **Allocations**

		Account Segment	Fund Segment	Program Segment	Project Segment	CFDA Segment	Operating Unit Segment	Allocation Start Date	Allocation End Date	Percentage Allocation	Allocated Flat Amount
Current Service Level	1st Allocation	511110 - Sals-Regular Pay	09000_19002 - Duties	No_Program	No_Project	No_CFDA	No_OU	1/1/07		70	
	2nd Allocation	511110 - Sals-Regular Pay	09000_19511 - Carryover	No_Program	No_Project	No_CFDA	No_OU	1/1/07		30	

Position Details – Compensation Expense

Expense

Total Position Vacancy

Employee: Total Employees

	YearTotal	Q1	Q2	Q3	Q4
Basic Salary Expense	51846.00	12961.50	12961.50	12961.50	12961.50
Additional Earning Expense	216.00	54.00	54.00	54.00	54.00
Benefits Expense	11291.76	2822.94	2822.94	2822.94	2822.94
Total Taxes	3214.45	803.61	803.61	803.61	803.61
Total Compensation Expense	66568.21	16642.05	16642.05	16642.05	16642.05
Gross Earnings	51846.00	12961.50	12961.50	12961.50	12961.50
Taxable Compensation	51846.00	12961.50	12961.50	12961.50	12961.50

Menu Items

- **Add Position** – Allows the budget preparer to request new positions. The compensation elements and allocation details come in from defaults set by administrators.
- **Exclude Position** – Excludes the position from the budget for the specified effective start date and end date range.
- **Single Step Position Transfer** – Allows the users to transfer the position from one entity (agency) to another.
- **Transfer out a Position** – Transfers the position out to a pool from where it can be transferred-in to another entity (agency).

Menu Items

- **Reverse Transfer** – Users can reverse transfers in order to:
 - Undo transfers made by mistake
 - Undo transfers that do not result in the desired compensation expense
- **Terminate Position** - Terminated positions expenses are not included in the budget. Position expenses accrued prior to termination are included in the budget.
- **Delete Position for Specific Version** – Deletes the position for specific version.
- **Delete Position Across All Version** – Deletes the position from the database.
- **Synchronize Position properties** – This menu item is used to apply changes made to the compensation details and salary grades (by administrator) to all the positions.

REVIEW COMPENSATION

Hyperion gives capability to review compensation by Position

Task - Review position budgets-Position Expenses for each Period		Task Instructions			
Current Scenario: Budget		Current Year of View: FY16			
09000_1000001 - Administration					
	YearTotal	Q1	Q2	Q3	Q4
EP09000015 - Info Sys Operating Sys Spec	36967.09	9241.77	9241.77	9241.77	9241.77
EP09000051 - Specialist	39512.70	9878.18	9878.18	9878.18	9878.18
EP09000072 - Specialist	42314.26	10578.56	10578.56	10578.56	10578.56
EP09000164 - Information Sys Operations Spe	45394.06	11348.51	11348.51	11348.51	11348.51
EP09000064 - Data Base Administrator	49034.59	12258.65	12258.65	12258.65	12258.65
EP09000107 - Senior Programmer Analyst	52765.40	13191.35	13191.35	13191.35	13191.35
EP09000089 - I.S. Network Mgmt Specialist	56604.53	14151.13	14151.13	14151.13	14151.13
EP09000049 - Info Sys Operating Sys Spec	61112.72	15278.18	15278.18	15278.18	15278.18
EP09000087 - Specialist	66568.21	16642.05	16642.05	16642.05	16642.05
EP09001046 - Temporary	217877.58	54469.40	54469.40	54469.40	54469.40
EP09001059 - Employee Assistance Prog Cdnr	79958.97	19989.74	19989.74	19989.74	19989.74
EP09001062 - Temporary	266575.59	66643.90	66643.90	66643.90	66643.90
EP09001792 - Systems Support Specialist	98914.61	24728.65	24728.65	24728.65	24728.65
EP09000717 - Information Systems Manager	110278.01	27569.50	27569.50	27569.50	27569.50
EP09000719 - Admr of Information Technology	17242.56	4310.64	4310.64	4310.64	4310.64
New Position 2	9318.76	2329.69	2329.69	2329.69	2329.69
New Position 3	9375.76	2343.94	2343.94	2343.94	2343.94
All Positions	2569821.38	642455.35	642455.35	642455.35	642455.35

REVIEW COMPENSATION

Review entity compensation budgets by Employee

Task - Review Employee Budget-Employee Expense by Period		Task Instructions				
Current Scenario: Budget		Current Year of View: FY16				
09000_1000001 - Administration						
	YearTotal	Q1	Q2	Q3	Q4	
EE100020	32976.09	8244.02	8244.02	8244.02	8244.02	
EE100022	79958.97	19989.74	19989.74	19989.74	19989.74	
EE100026	61112.72	15278.18	15278.18	15278.18	15278.18	
EE100003	72625.86	18156.47	18156.47	18156.47	18156.47	
EE100034	32248.62	8062.16	8062.16	8062.16	8062.16	
EE100039	42314.26	10578.56	10578.56	10578.56	10578.56	
EE100018	45394.06	11348.51	11348.51	11348.51	11348.51	
EE100041	32248.62	8062.16	8062.16	8062.16	8062.16	
EE100023	72625.86	18156.47	18156.47	18156.47	18156.47	
EE100048	110278.01	27569.50	27569.50	27569.50	27569.50	
EE100042	45394.06	11348.51	11348.51	11348.51	11348.51	
EE100019	79958.97	19989.74	19989.74	19989.74	19989.74	
EE100052	98914.61	24728.65	24728.65	24728.65	24728.65	
EE100011	88858.53	22214.63	22214.63	22214.63	22214.63	
EE100024	39512.70	9878.18	9878.18	9878.18	9878.18	
Existing Employees	2047366.79	511841.70	511841.70	511841.70	511841.70	
+ New Employees	9318.76	2329.69	2329.69	2329.69	2329.69	
+ Total Employees	2569821.38	642455.35	642455.35	642455.35	642455.35	

REVIEW COMPENSATION

Review entity compensation budgets by compensation Elements

Task - Review element budgets-Element Expenses for each Period - Elements on Row		Task Instructions					
09000_1000001 - Administration		Current Scenario: Budget		Current Stage: Stage 1		Current Year of View: FY16	
			YearTotal	Q1	Q2	Q3	Q4
EP09000717 - Information Systems Manager	EE173803 -	CLAS-R	93004.00	23251.00	23251.00	23251.00	23251.00
		CLAS - Classified Salary Schedule	93004.00	23251.00	23251.00	23251.00	23251.00
		Salary Grades	93004.00	23251.00	23251.00	23251.00	23251.00
		CEL - Cellular Phone Usage	180.00	45.00	45.00	45.00	45.00
		VEH - Vehicle Usage \$3.00	36.00	9.00	9.00	9.00	9.00
		Additional Earnings	216.00	54.00	54.00	54.00	54.00
		BEA - Medical Allowances	7691.76	1922.94	1922.94	1922.94	1922.94
		RTP - Retirement Pay	3600.00	900.00	900.00	900.00	900.00
		Benefits	11291.76	2822.94	2822.94	2822.94	2822.94
		Federal Insurance Contributions Act - FICA	5766.25	1441.56	1441.56	1441.56	1441.56
		Employer-paid Taxes	5766.25	1441.56	1441.56	1441.56	1441.56
EP09000719 - Admr of Information Technology	EE245150 -	345U-01	5400.00	1350.00	1350.00	1350.00	1350.00
		345U	5400.00	1350.00	1350.00	1350.00	1350.00
		Salary Grades	5400.00	1350.00	1350.00	1350.00	1350.00
		CEL - Cellular Phone Usage	180.00	45.00	45.00	45.00	45.00
		VEH - Vehicle Usage \$3.00	36.00	9.00	9.00	9.00	9.00
		Additional Earnings	216.00	54.00	54.00	54.00	54.00
		BEA - Medical Allowances	7691.76	1922.94	1922.94	1922.94	1922.94
		RTP - Retirement Pay	3600.00	900.00	900.00	900.00	900.00
		Benefits	11291.76	2822.94	2822.94	2822.94	2822.94
		Federal Insurance Contributions Act - FICA	334.80	83.70	83.70	83.70	83.70
		Employer-paid Taxes	334.80	83.70	83.70	83.70	83.70
All Positions	Total Employees	Total Compensation Expenses	2560445.62	640111.41	640111.41	640111.41	640111.41

REVIEW COMPENSATION

Review entity FTE assignments

Task - Review FTE assignments-Entity-level FTE, Status and Headcount Task Instructions

Current Scenario: Budget

Current Stage: Stage 1

Current Year of View: FY1

09000_1000001 - Administration

		Status	⊕ Total FTE	Assigned FTE	Available FTE	⊕ Headcount
			FY16	FY16	FY16	FY16
	Vacancy	Active	1	0	1	1
	EE100008	Active	1		1	
EP09000089 - I.S. Network Mgmt Specialist	Vacancy	Active	1	0	1	1
	EE100029	Active	1		1	
EP09000049 - Info Sys Operating Sys Spec	Vacancy	Active	1	0	1	1
	EE100026	Active	1		1	
EP09000087 - Specialist	Vacancy	Active	1	0	1	1
	EE100005	Active	1		1	
EP09001046 - Temporary	Vacancy	Active	3	0	3	1
	EE100023	Active	1		1	
EP09001059 - Employee Assistance Prog Cdnr	Vacancy	Active	1	0	1	1
	EE100019	Active	1		1	
EP09001062 - Temporary	Vacancy	Active	3	0	3	1
	EE100011	Active	1		1	
EP09001792 - Systems Support Specialist	Vacancy	Active	1	0	1	1
	EE160940	Active	1		1	
EP09000717 - Information Systems Manager	Vacancy	Active	1	0	1	1
	EE173803	Active	1		1	
EP09000719 - Admr of Information Technology	Vacancy	Active	1	0	1	1
	EE245150	Active	1		1	
New Position 1	Vacancy					
New Position 2	Vacancy	Active	1	0	1	1
All Positions	⊕ Total Employees		83.9	-2	85.9	38

ASSIGNING SEGMENTS TO POSITIONS

- In order to update the Segment Information, use form “Assign Segments”
- This form allows you to view the allocation lines for all the positions and employees for users entity.

Task - Assign Segments-MassUpdate		Task Instructions											
Version: Stage 1		Scenario: Budget		Current Year of View: FY16									
09000_1000001 - Administration													
		Fund Segment	Program Se	Project Seg	CFDA Segment	Operating Unit	Percen	Basic Salary	Earnings	Benefits E	Total Taxes	Total Compens	
EP09000009 - Certified Publ	EE100007	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	13671.00	924.00	448.69	847.60	15891.29
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	5859.00	396.00	192.29	363.26	6810.55
EP09000185 - Executive Fell	EE100034	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	13671.00	924.00	5384.23	847.60	20826.83
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	5859.00	396.00	2307.53	363.26	8925.79
EP09000183 - Administrative	EE100030	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	14150.50	924.00	5384.23	877.33	21336.06
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	6064.50	396.00	2307.53	376.00	9144.03
EP09000094 - Budget Analy	EE106844	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	15255.10	924.00	5384.23	945.82	22509.15
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	6537.90	396.00	2307.53	405.35	9646.78
EP09000105 - Coordinator	EE111398	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	15102.99	924.00	4845.81	936.39	21809.18
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	4315.14	396.00	1384.52	267.54	6363.20
EP09000213 - Temporary	EE100024	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	18459.00	924.00	5384.23	1144.46	25911.69
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	7911.00	396.00	2307.53	490.48	11105.01
EP09000048 - Certified Publ	EE100039	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	20305.60	924.00	5384.23	1258.95	27872.78
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	8702.40	396.00	2307.53	539.55	11945.48
EP09000135 - Accountant	EE100042	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	22335.60	924.00	5384.23	1384.81	30028.64
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	9572.40	396.00	2307.53	593.49	12869.42
EP09000177 - Temporary	EE100035	1st Allocation	09000_19002 - Dut	No_Program	No_Project	126000000 - Com	09000 - ADM10	70	24735.20	924.00	5384.23	1533.58	32577.01
		2nd Allocation	09000_19511 - Car	No_Program	No_Project	126000000 - Com	09000 - ADM10	30	10600.80	396.00	2307.53	657.25	13961.58

EXCEL RETRIEVE

A	B	C	D	E	F	G	H
			Fund Segment	Program Segment	Project Segment	CFDA Segment	Operating Unit Segment
EP09000072 - Specialist	EE100031	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000164 - Information Sys Operations Spe	EE100018	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000064 - Data Base Administrator	EE100050	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000107 - Senior Programmer Analyst	EE100008	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000089 - I.S. Network Mgmt Specialist	EE100029	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000049 - Info Sys Operating Sys Spec	EE100026	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000087 - Specialist	EE100005	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09001046 - Temporary	EE100023	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09001059 - Employee Assistance Prog Cdnr	EE100019	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09001062 - Temporary	EE100011	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09001792 - Systems Support Specialist	EE160940	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000717 - Information Systems Manager	EE173803	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
EP09000719 - Admr of Information Technology	EE245150	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
New Position 2	To be Hired 1	1st Allocation	09000_19002 - Duties	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
		2nd Allocation	09000_19511 - Carryover	No_Program	No_Project	126000000 - Community Economic Adjustment	09000 - ADM10001 - NoPRD_A
Total Positions	Total Employees	Budget Item					

EXCEL RETRIEVE

A	B	C	I	J	K	L	M	N
			Percentage Allocation	Basic Salary Expense	Earnings Expense	Benefits Expense	Total Taxes	Total Compensation Expenses
EP09000072 - Specialist	EE100031	1st Allocation	70	20305.60	924.00	5384.23	1258.95	27872.78
		2nd Allocation	30	8702.40	396.00	2307.53	539.55	11945.48
EP09000164 - Information Sys Operations Spe	EE100018	1st Allocation	70	22335.60	924.00	5384.23	1384.81	30028.64
		2nd Allocation	30	9572.40	396.00	2307.53	593.49	12869.42
EP09000064 - Data Base Administrator	EE100050	1st Allocation	70	24735.20	924.00	5384.23	1533.58	32577.01
		2nd Allocation	30	10600.80	396.00	2307.53	657.25	13961.58
EP09000107 - Senior Programmer Analyst	EE100008	1st Allocation	70	27194.30	924.00	5384.23	1686.05	35188.58
		2nd Allocation	30	11654.70	396.00	2307.53	722.59	15080.82
EP09000089 - I.S. Network Mgmt Specialist	EE100029	1st Allocation	70	29724.80	924.00	5384.23	1842.94	37875.97
		2nd Allocation	30	12739.20	396.00	2307.53	789.83	16232.56
EP09000049 - Info Sys Operating Sys Spec	EE100026	1st Allocation	70	32696.30	924.00	5384.23	2027.17	41031.70
		2nd Allocation	30	14012.70	396.00	2307.53	868.79	17585.02
EP09000087 - Specialist	EE100005	1st Allocation	70	36292.20	924.00	5384.23	2250.12	44850.55
		2nd Allocation	30	15553.80	396.00	2307.53	964.34	19221.66
EP09001046 - Temporary	EE100023	1st Allocation	70	40285.00	924.00	5384.23	2497.67	49090.90
		2nd Allocation	30	17265.00	396.00	2307.53	1070.43	21038.96
EP09001059 - Employee Assistance Prog Cdnr	EE100019	1st Allocation	70	45118.50	924.00	5384.23	2797.35	54224.08
		2nd Allocation	30	19336.50	396.00	2307.53	1198.86	23238.89
EP09001062 - Temporary	EE100011	1st Allocation	70	50984.50	924.00	5384.23	3161.04	60453.77
		2nd Allocation	30	21850.50	396.00	2307.53	1354.73	25908.76
EP09001792 - Systems Support Specialist	EE160940	1st Allocation	70	57612.80	924.00	5384.23	3571.99	67493.03
		2nd Allocation	30	24691.20	396.00	2307.53	1530.85	28925.58
EP09000717 - Information Systems Manager	EE173803	1st Allocation	70	65102.80	924.00	5384.23	4036.37	75447.41
		2nd Allocation	30	27901.20	396.00	2307.53	1729.87	32334.60
EP09000719 - Admr of Information Technology	EE245150	1st Allocation	70	3780.00	924.00	5384.23	234.36	10322.59
		2nd Allocation	30	1620.00	396.00	2307.53	100.44	4423.97
New Position 2	To be Hired 1	1st Allocation	70	1138.90	924.00	5384.23	70.61	7517.74
		2nd Allocation	30	488.10	396.00	2307.53	30.26	3221.89
Total Positions	Total Employees	Budget Item		1557830.13	50160.00	283774.67	96585.47	1988350.26

NAMES OF POSITION CHANGING OVER TIME

EE100117

- EP09000197 - Apps Support Development Admin
1/5/2014
- EP09000197 - Data Processing Administrator
7/25/1998
- EP09000197 - Manager
10/25/2006
1/1/2009
8/1/2009
6/2/2013

EE100118

- EP09000063 - I.S. Applications Specialist
10/9/1992
1/1/2009
- EP09000063 - Information Sys Application Sp
1/1/2010
7/1/2012

EE100119

- EP09000061 - Administrative Officer
6/30/2013
7/28/2013
- EP09000061 - Dir. Transaction Processing
1/5/2014
- EP09000061 - Financial Manager/Comptroller
10/9/1992
4/2/2012

EP02500340

- EP02500340 - Construction/Maintenance Techn
- EP02500340 - Facil Programs Officer (OMD)
- EP02500340 - Mechanical Contractor
- EP02500340 - Mechanical Journeyman

EP02500342

- EP02500342 - Inventory/Supply Officer
- EP02500342 - Materiel Management Specialist

EP02500349

- EP02500349 - Counselor I
- EP02500349 - Dep Dir of Operations Support

EP02500353

- EP02500353 - Engineer
- EP02500353 - Resident/Nonresident Liaison

EP02500354

- EP02500354 - Laborer III
- EP02500354 - Shift Supervisor

EP02500355

- EP02500355 - Information Systems Network Ad
- EP02500355 - Shift Supervisor

EP02500356

- EP02500356 - Help Desk Manager
- EP02500356 - Shift Supervisor

EP02500357

- EP02500357 - Maintenance Repair Tech I
- EP02500357 - Shift Supervisor

POSITION WITH DIFFERENT PAY TYPES

- Two data lines, both marked as active positions

EP02500049 - Construction/Maintenance Techn
02500_0300301
EE210374
9/9/2008
NonExempt
12/1/2010
NoFLSARequired
EP02500049 - Facility Manager
02500_0300301
EE210374
6/1/2012
NonExempt
6/14/2012
NoFLSARequired
EP02500050 - Military Construction Consult
02500_0200204
EE106995
7/1/2008
NonExempt
3/1/2010
NoFLSARequired

EMPLOYEE PROPERTY ANOMALIES

- Three different lines with same *Position Start Date*
- All three are active with different *FT/PT* information and *Employee Type*

Example 1

Position Name	Position Type	Job	Position Start Date	Default Weekly Hours	Salary Basis	Location Code	Annual Salary Spread	Employee Number	Hire Date	FT/PT	Employee Type	Pay Type
EP34000071 - Administrative Technician	Single_Incumber	JCE16A	2/12/1993	40	Annual		1 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16A	2/12/1993	40	Annual		1 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16A	2/12/1993	40	Annual		1 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	4/6/2010	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	4/6/2010	40	Annual		16 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	4/6/2010	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	6/23/2008	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	6/23/2008	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	6/23/2008	40	Annual		16 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	7/12/2011	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	7/12/2011	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	7/12/2011	40	Annual		16 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	9/14/2012	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	9/14/2012	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Administrative Technician	Single_Incumber	JCE16C	9/14/2012	40	Annual		16 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt
EP34000071 - Typist Clerk II (Temporary)	Single_Incumber	JC0189	10/23/2013	40	Annual		16 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt
EP34000071 - Typist Clerk II (Temporary)	Single_Incumber	JC0189	10/23/2013	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Typist Clerk II (Temporary)	Single_Incumber	JC0189	10/23/2013	40	Annual		16 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Typist Clerk II (Temporary)	Single_Incumber	JC0189	12/4/2013	20	Annual		16 Average	EE179522	10/24/2011	FullTime	Regular	NonExempt
EP34000071 - Typist Clerk II (Temporary)	Single_Incumber	JC0189	12/4/2013	20	Annual		16 Average	EE179522	10/24/2011	FullTime	Temporary	NonExempt
EP34000071 - Typist Clerk II (Temporary)	Single_Incumber	JC0189	12/4/2013	20	Annual		16 Average	EE179522	10/24/2011	PartTime	Temporary	NonExempt

EMPLOYEE PROPERTY ANOMALIES

Example 2

Position Name	Position Type	Job	Position Start Date	Default Weekly Hours	Salary Basis	Location Code	Annual Salary Spread	Employee Number	Hire Date	FT/PT	Employee Type	Pay Type
EP09000027 - Administrative Officer	Single_Incumber	JC4903	1/2/2011	40	Annual	ISD-ADMII	Average	EE105100	8/23/1973	PartTime	Temporary	NoFLSARRequired
EP09000027 - Administrative Officer	Single_Incumber	JC4903	1/2/2011	40	Annual	ISD-ADMII	Average	EE105100	8/23/1973	FullTime	Regular	NoFLSARRequired
EP09000027 - Administrative Officer	Single_Incumber	JC4903	1/1/2011	40	Annual	VACANT	Average	EE105100	8/23/1973	PartTime	Temporary	NonExempt
EP09000027 - Administrative Officer	Single_Incumber	JC4903	1/1/2011	40	Annual	VACANT	Average	EE105100	8/23/1973	FullTime	Regular	NonExempt
EP09000027 - Temporary	Single_Incumber	JC0020	4/1/2013	20	Annual	ISD-400	Average	EE105100	8/23/1973	PartTime	Temporary	NonExempt
EP09000027 - Temporary	Single_Incumber	JC0020	4/1/2013	20	Annual	ISD-400	Average	EE105100	8/23/1973	FullTime	Regular	NonExempt
EP09000027 - Administrative Assistant	Single_Incumber	JCE17A	4/26/2006	40	Annual	VACANT	Average	EE105100	8/23/1973	PartTime	Temporary	NonExempt
EP09000027 - Administrative Assistant	Single_Incumber	JCE17A	4/26/2006	40	Annual	VACANT	Average	EE105100	8/23/1973	FullTime	Regular	NonExempt
EP09000027 - Administrative Officer	Single_Incumber	JC4903	7/1/2012	40	Annual	ISD-400	Average	EE105100	8/23/1973	PartTime	Temporary	NoFLSARRequired
EP09000027 - Administrative Officer	Single_Incumber	JC4903	7/1/2012	40	Annual	ISD-400	Average	EE105100	8/23/1973	FullTime	Regular	NoFLSARRequired
EP09000027 - Administrative Assistant	Single_Incumber	JCE17A	10/9/1992	40	Annual	VACANT	Average	EE105100	8/23/1973	FullTime	Regular	NonExempt
EP09000027 - Administrative Assistant	Single_Incumber	JCE17A	10/9/1992	40	Annual	VACANT	Average	EE105100	8/23/1973	PartTime	Temporary	NonExempt

- The employee was hired on 3/3/2014, still was applied to an old position
- All three are active with different *FT/PT* information and *Employee Type*

Position Name	Position Type	Job	Position Start Date	Default Weekly Hours	Salary Basis	Location Code	Annual Salary Spread	Employee Number	Hire Date	FT/PT	Employee Type	Pay Type
EP02500585 - Food Service Worker I	Single_Incumb	JC3076	1/2/2011	40	Annual	20	Average	EE173465	9/8/2010	FullTime	Regular	NonExempt
EP02500585 - Food Service Worker I	Single_Incumb	JC3076	1/2/2011	40	Annual	20	Average	EE285312	3/3/2014	FullTime	Regular	NonExempt
EP02500585 - Food Service Worker I	Single_Incumb	JC3076	1/1/2011	40	Annual	46	Average	EE285312	3/3/2014	FullTime	Regular	NonExempt
EP02500585 - Food Service Worker I	Single_Incumb	JC3076	1/1/2011	40	Annual	46	Average	EE173465	9/8/2010	FullTime	Regular	NonExempt
EP02500585 - Residential Supervisor	Single_Incumb	JC0487	1/4/2000	40	Annual	46	Average	EE285312	3/3/2014	FullTime	Regular	NonExempt
EP02500585 - Residential Supervisor	Single_Incumb	JC0487	1/4/2000	40	Annual	46	Average	EE173465	9/8/2010	FullTime	Regular	NonExempt
EP02500585 - Residential Supervisor	Single_Incumb	JC0487	5/4/2006	40	Annual	46	Average	EE173465	9/8/2010	FullTime	Regular	NonExempt
EP02500585 - Residential Supervisor	Single_Incumb	JC0487	5/4/2006	40	Annual	46	Average	EE285312	3/3/2014	FullTime	Regular	NonExempt
EP02500585 - Recruitment Coordinator	Single_Incumb	JC1578	2/1/2014	40	Annual	20	Average	EE173465	9/8/2010	FullTime	Regular	NonExempt
EP02500585 - Recruitment Coordinator	Single_Incumb	JC1578	2/1/2014	40	Annual	20	Average	EE285312	3/3/2014	FullTime	Regular	NonExempt
EP02500585 - Recruitment Coordinator	Single_Incumb	JC1578	3/1/2014	40	Annual	20	Average	EE285312	3/3/2014	FullTime	Regular	NoFLSARequired
EP02500585 - Recruitment Coordinator	Single_Incumb	JC1578	3/1/2014	40	Annual	20	Average	EE173465	9/8/2010	FullTime	Regular	NoFLSARequired

CLOSING REMARKS

- Priorities
 - Data Clean-up
 - Inactivate unused positions
 - One position per employee
 - Exceptions – seasonal, National Guard, temps
 - New queries available soon
 - Due date: **6/30/2014**

Questions or Comments?

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