

Salary Planner
Budget Profile Code Verification Instructions
April 2018

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 8/16/18 for Academic positions and 8/26/18 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 8/16/18 for Academics and 8/26/18 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 <https://hrnet.uillinois.edu/uhr/HRSystems/ReportingPortal/HRReports/DeptReportList/deptReports.cfm>. 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 7, 2018, changes must be made by May 6, 2018 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 26, 2018.

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 8/16/2018 for Academic and 8/26/2018 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 8/16/2018 for Academic and 8/26/2018 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 8/16/2018 for Academics or 8/26/18 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://www.hr.uillinois.edu/UserFiles/Servers/Server_4208/File/SP_FAQ.pdf.

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

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

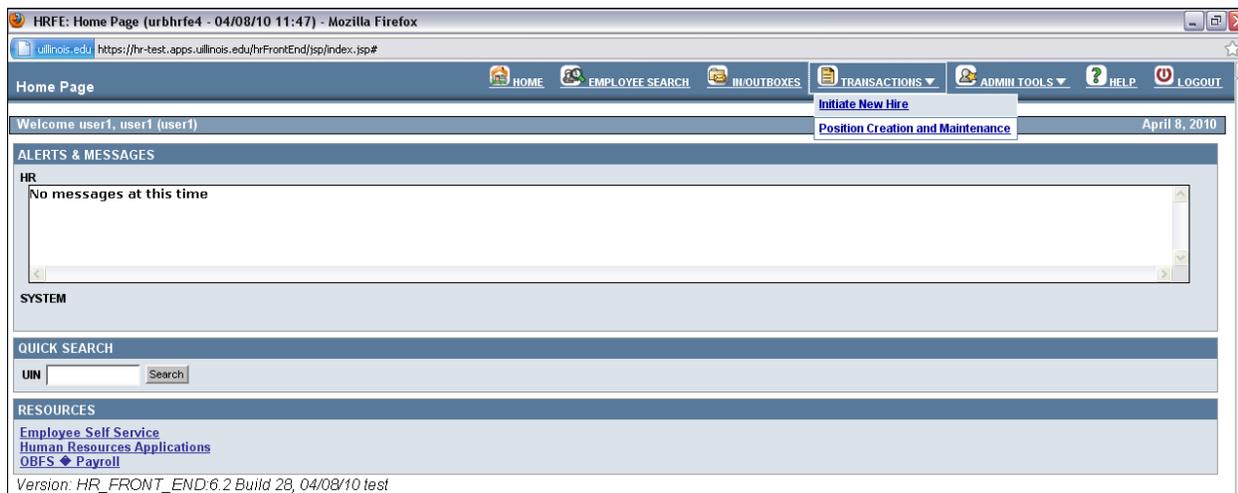
Salary Planner – Changing Budget Profile Code in HR Front End

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.

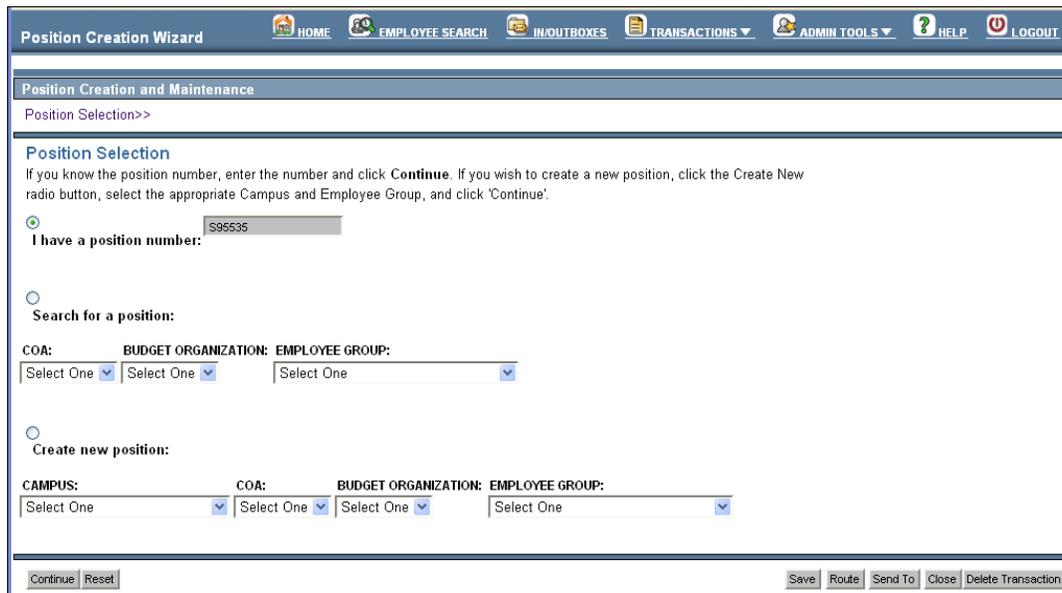
NOTE: If the Budget Profile Code needs to be changed on a single, FILLED position, you will be prompted to go to the incumbent’s Employee Record View. From there you would complete the transaction as an **Employee Job Record Change**. It is quickest to begin an [Employee Job Record Change](#) directly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



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.*

Position Creation and Maintenance
Position Selection>> Position Search Results>>

Table will display all positions that meet search criteria **except**
Those with a Status of 'Closed'.
Those with a Position End Date present.

Position	Position Title	P-Class	E-Class	Position Begin Date	Type	COA	Budget Org	Last Incumbent	Job End Date
595413	XH CLERICAL (LS)	99913 - XH CLERICAL (LS)	EH - CS Extra Help	8/18/2008	S	4 - University of Illinois -Springfield	390000 - Auditorium	Georgia Smith	
595415	XH STGHD (LS)	99942 - XH STGHD (LS)	EH - CS Extra Help	7/21/2008	P	4 - University of Illinois -Springfield	390000 - Auditorium		
595535	XH PARA PROF (LS)	99962 - XH PARA PROF (LS)	EH - CS Extra Help	11/16/2007	S	4 - University of Illinois -Springfield	390000 - Auditorium	Trevor Brown	7/3/2008
595739	XH CLERICAL (LS)	99913 - XH CLERICAL (LS)	EH - CS Extra Help	8/27/2007	S	4 - University of Illinois -Springfield	390000 - Auditorium	Jane Jones	3/5/2008
595807	XH TECH (LS)	99922 - XH TECH (LS)	EH - CS Extra Help	6/1/2007	P	4 - University of Illinois -Springfield	390000 - Auditorium		
596319	XH PARA PROF (LS)	99962 - XH PARA PROF (LS)	EH - CS Extra Help	1/15/2006	P	4 - University of Illinois -Springfield	390000 - Auditorium		
598480	XH PARA PROF (LS)	99962 - XH PARA PROF (LS)	EH - CS Extra Help	6/1/2004	S	4 - University of Illinois -Springfield	390000 - Auditorium	Hector Villegas	

Incumbent History

Continue Save Route Send To Close Delete Transaction

- 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

Position Creation Wizard

Transaction #: 1 Position #: 595535
Position Selection>> Position Search Results>> Position Data

Position Data

Review the position data. Edit the fields as necessary.

CHANGE DATE: 11/22/2009 POSITION END DATE:

POSITION #: 595535 POSITION CLASS: 99962 - XH PARA PROF (LS) POSITION TITLE: XH PARA PROF (LS) POSITION EMPLOYEE CLASS: EH - CS Extra Help

TYPE: S - Single POSITION BEGIN DATE: 11/16/2007 PAPER#: Blank

SALARY GROUP: 2009 TABLE: UC GRADE: 9996 STEP: 10.33 SALARY RANGE: LOW: 10.33 MIDPOINT: 10.33 HIGH: 35.0

BARGAINING UNIT: NONE PD PROB PERIOD: N - No ACCRUE SENIORITY: No Job Progression JOB PROGRESSION: No Job Progression

POSITION DESCRIPTORS:
Blank Remove
AEDRS - Has Budget responsibility Add

BUDGET PROFILE: X - Not Budgeted BUDGET COA: 4 BUDGET ORG: 390000 - Auditorium

COA	Index	Fund	Organization	Account	Program	Activity	Location	Percent
4	302592		390000	216920	390004			100.0
TOTALS								100.00

Update LD Add LD

Required fields *

Save Route Send To Close Delete Transaction

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 shows the Employee Record View (ERV) screen for employee Wood, Tanya Smith. The 'BUDGET PROFILE' field is highlighted with a red box. The screen displays various tabs and sections, including 'EMPLOYEE GENERAL INFORMATION', 'JOBS', and 'NEW HIRE FORMS'. The 'POSITION DATA' section is expanded, showing details such as 'CHANGE DATE', 'POSITION #', 'POSITION CLASS', 'POSITION TITLE', 'POSITION EMPLOYEE CLASS', 'TYPE', 'POSITION BEGIN DATE', 'PAPE #', 'SALARY', 'BARGAINING UNIT', 'PROB PERIOD', 'ACCUE SENIORITY', 'JOB PROGRESSION', and 'POSITION DESCRIPTORS'. The 'BUDGET PROFILE' field is set to 'R - Recurring'. The 'POSITION LABOR DISTRIBUTION' table is also visible at the bottom.

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.*