Reviewing Employee's Attachment to a Position Budget

Overview

After you define and approve your position budgets, you can attach employee records to them. You attach an employee record to a position budget to control budget expenditures and to ensure data integrity. To attach an employee record to a position budget, you enter a position ID in the employee's record when you are entering employee information during employee setup or as part of one of the transfer employee processes.

To help you stay within your position budgets when you are entering employee information, the system sends you either an error or a warning message when you exceed the approved salary, hours, FTE, or head count for the position.

When you attach an employee record to a position budget, the system performs the following functions:

- Adds the salary, hours, FTEs, and headcount amounts for the employee to the projected position budget amounts through the fiscal year end.
- Adds to the employee's record any job information that is associated with the position.
- Updates the Position Budget Detail table (F08111) with the effective date of the employee's assignment, the employee's salary, FTE, and hours. The system then uses this information to project the effect of these values on the budget through the end of the fiscal year.

This work instruction shows how to review an employee's attachment to a Position Budget.

This work instruction shows how to:

Attach Employee to Position Budget

Review Employee's Attachment to Position Budget

This work instruction includes:

Additional Functions and Options

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: http://www.das.state.ne.us/.

Navigation

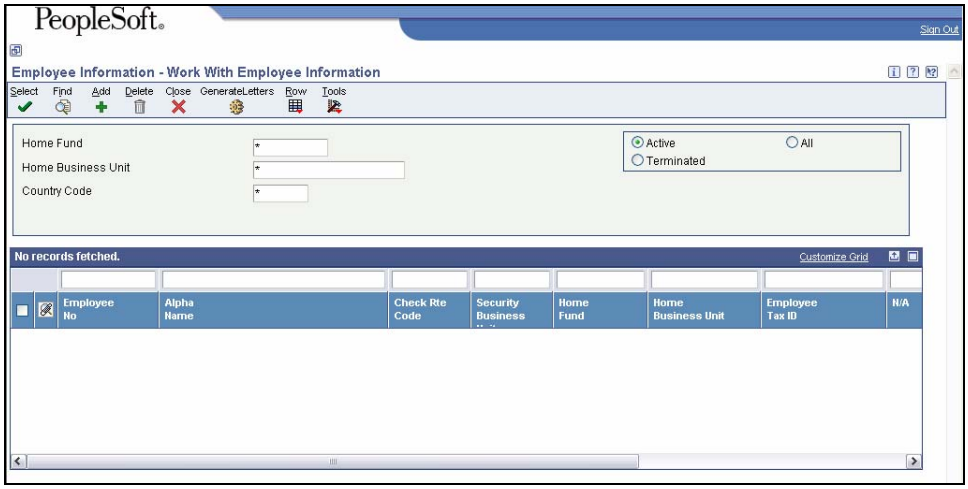
Human Resources and Payroll – Agencies > Employee Maintenance > Employee Information

Steps

Attach Employee to Position Budget

This activity will only be used when attaching a newly created position to a currently active employee.

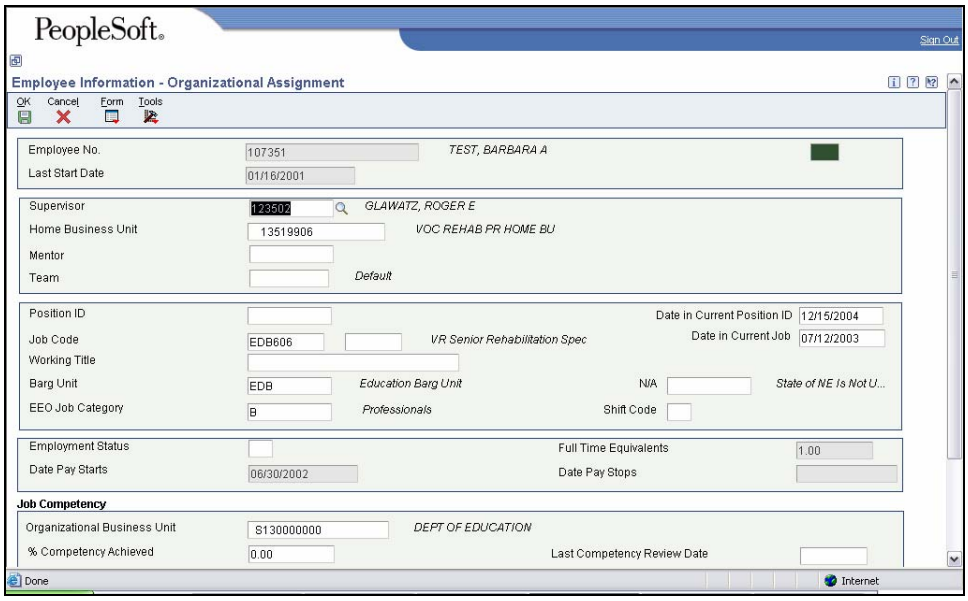
Start this instruction from the Employee Information – Work With Employee Information window.



1. Enter all or part of the employee name in the QBE (query-by-example) line directly above the Alpha Name column in the grid, to search.
2. To locate the employee record, complete the following field and click **Find**:
   - Employee No

   Use the Visual Assist to help you search for Employees.
3. Choose the employee record.
4. Click **Row, Organizational**. The Employee Information – Organizational Assignment window appears.

The following example only shows the top portion of the window.



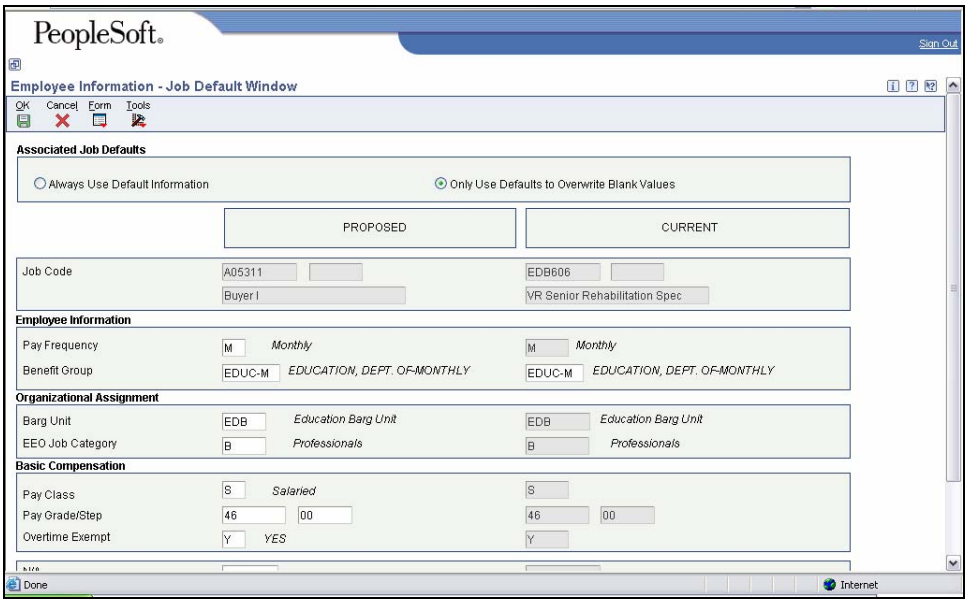
5. Complete the following fields:
   - Position ID
   - Date in Current Position ID
   - Date in Current Job

Before proceeding, be sure that the Employee Home Business Unit and the Position Home Business Unit are the same.

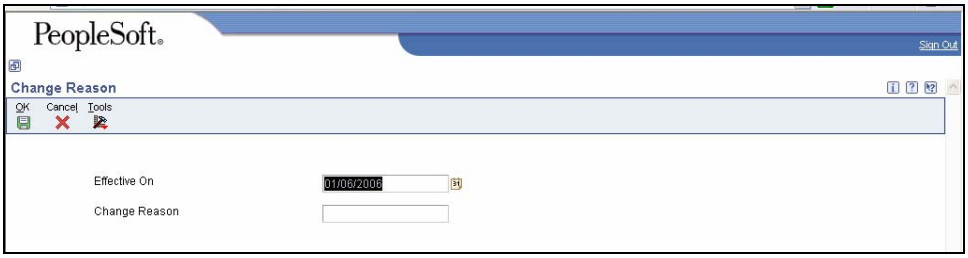
6. Click **OK**. The Employee Information – Job Default window appears.

   A yellow warning appears. Click **OK** to continue to the Job Default window.

   If there are no differences between the old and new job code, this window may not appear, with the system automatically advancing to the Change Reason window. If the Change Reason window appears, skip to Step 10.



7. Click the Always Use Default Information radio button.
8. Review the following fields in the Proposed column, making changes as needed. This information will populate the Employee Master:
   - Pay Frequency
   - Benefit Group
   - Group Code
   - EEO Job Category
   - Pay Class
   - Pay Grade/Step
   - Overtime Exempt
9. Click **OK**. The Employee Information – Change Reason window appears.



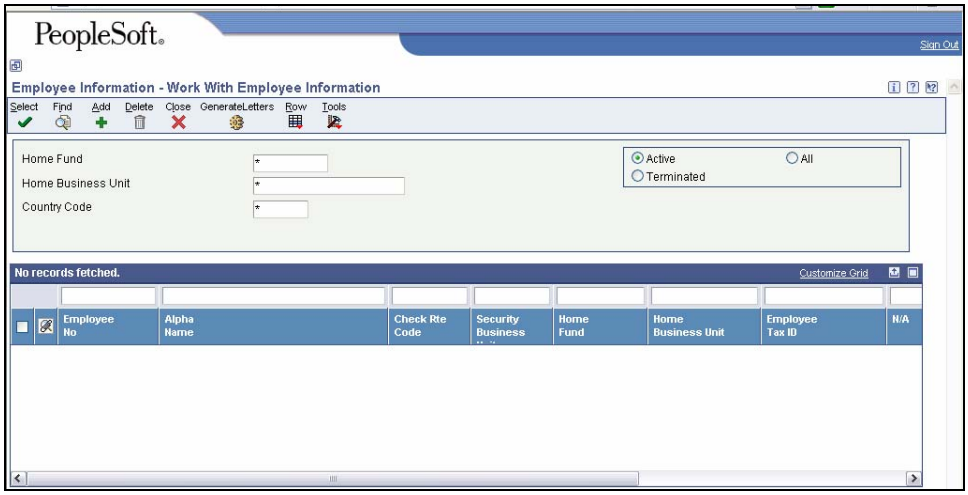
10. Enter the Effective On date (defaults to current date).

    This date is only for history tracking

11. Enter the Change Reason code.
12. Click **OK**.
13. Click **Cancel**.
14. Click **Close**.

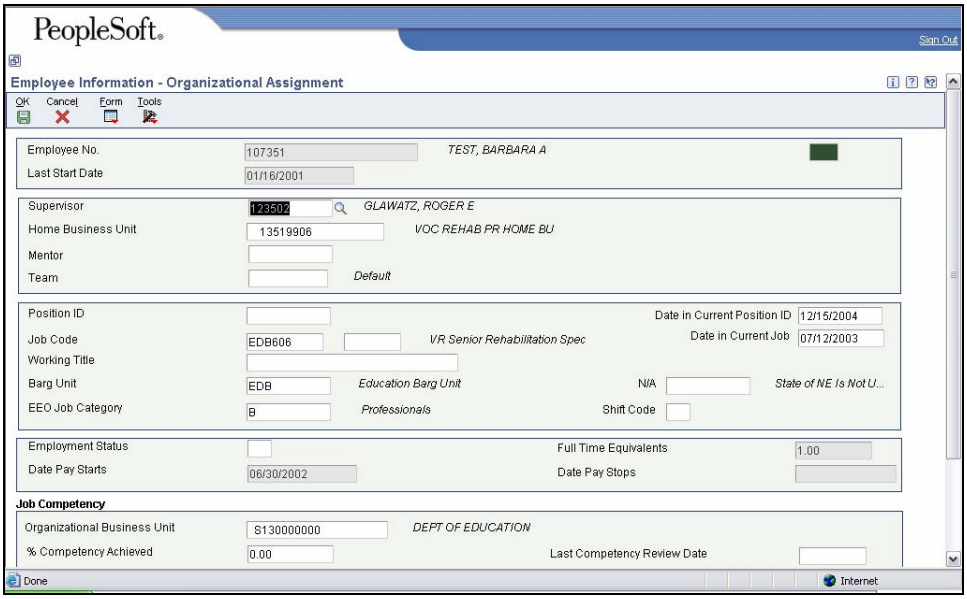
Review Employee's Attachment to Position Budget

Start this instruction from the Employee Information – Work with Employee Information window.



1. Enter all or part of the name in the QBE (query-by-example) line directly above the Alpha Name column in the grid, to search.
2. To locate the employee record, complete the following field and click **Find**:
   - Employee No

   Use the Visual Assist to help you search for Employees.
3. Choose the employee record, click **Row**, **Organizational**.



4. On the Employee Information – Organizational Assignment window, review the following fields:
   - Home Business Unit
   - Position ID

   Position ID's are tied directly to the Home Business Unit.

5. Click **Cancel**.
6. Click **Close**.

Additional Functions and Options

You can do the following from the Employee Information – Work With Employee Information window.

To	Do This
Review transaction history records.	1. Enter Employee #. 2. Click **Find**. 3. Choose Employee. 4. Select **Row, Organization**. 5. Click **Form, History Tracking**. 6. On the History window, review the information. Working with employee history records consists of the following tasks: • Reviewing complete history for an employee • Reviewing history for a specific field or data item. 7. To review complete history for an employee, click **Find**. 8. To review employee history for a specific data item, type the data item in the Data Item field, and click **Find**. Use the Visual Assist to help you search for data items. 9. Click **Cancel** after you have reviewed the information. 10. Click **Cancel**. 11. Click **Close**.