

Personnel

Personnel information is **Plan** and **Union** specific. One plan may contain personnel on more than one union sheet.

To enter personnel information make sure you have selected the **Plan** (aka division, activity, project) you would like to enter information for. Click on the personnel link under the **Sheets** tab that corresponds to the correct union the employees belong to.

NOTE: Changes to personnel information can only be made at the roll-up level of a plan if employees are allocated to that particular level of your plan. If you click on **Edit Plan** while you are in a roll-up level, most or all of the employee data will disappear and only those employees budgeted at that level will remain to be edited.

Personnel Sheet Data Overview

The following items are displayed on the **Personnel** sheets:

- **Plan:** This indicates the plan that the salaries and benefits costs for the employee will be charged to. It is possible to allocate one employee to multiple plans by right clicking in and cell in the row and selecting "Split row". In the drop-down box with Plan information, choose the plan you want to use and update the % of time allocated to that plan in the "Headcount" column.

NOTE: If you need to allocate an employee to a plan that someone else is responsible for budgeting, please contact them before you allocate an employee to their plan.

- **Employee Number:** Same as Cayenta
- **Name:** Same as Cayenta
- **Job Title:** Same as Cayenta
- **Headcount:** This equals the full time equivalent that the employee works. If an employee is allocated to more than one plan, enter the amount of their time that should be charged to that particular plan. When entering Headcount information, be sure to place a decimal point in front of the number. For example, if an employee works half time, type .50 not 50. If a person is full time and allocated to multiple plans please be sure their FTE is equal to 1.00.
- **Labor and Ind:** This field is available for your input. If the amount in the LI Expense column does not appear correct, you may choose a different L&I category for your employees from this column. Selecting a different rate here will automatically update the amount in the LI Expense column.
- **Average Salary:** This is a calculated field. It is based on the average daily hours worked, union code, step, range and last step date.
- **Average Daily Hours:** This number is based on the number of hours an employee would work for the entire year. This is a drop down menu; choose the number that best corresponds to your employee's work schedule. For example, if a person is a 35 hour per week employee, their average daily hours would be 7. If a person works 20 hours per week, their average daily hours would be 4.

- **Standard Hr Work Week:** This should have either “35” or “40” entered depending on whether the position is based on a 35 or 40 hour work week.
- **Employee Type:** Type A (Regular Full-Time), B (Regular Part-Time), C (Part-time, On-Call less than 50%), D (Part-time, On-Call less than 50%) or E (Elected).
- **Union Code:** This determines which salary schedule the employee’s pay rate should be calculated from.
- **Range:** Same as Cayenta.
- **Step:** Same as Cayenta.
- **Pension Code:** Same as Cayenta.
- **Hire Date:** Same as Cayenta.
- **End Date:** Same as Cayenta. If you have an employee that will be vacating a position you can enter a date and the salary will be calculated based on the time period they will be employed during 2013. If you have summer hires you can enter a start date and end date and a wage expense will be calculated for that time period.
- **Last Step Date:** Same as Cayenta.
- **Benefits:** Yes or No. An amount will be calculated based on the selection.

Making Personnel Changes

For existing employees the only fields you need to change will be the Plan, FTE, End Date, and possibly Labor and Ind. If you see errors in any of the other fields please let Budget & Finance know.