

How to Update the Staff Plan

INTRODUCTION

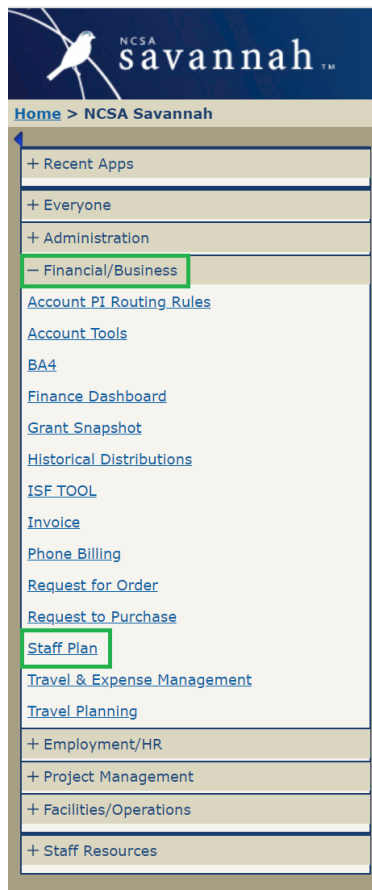
Staff Plan is a tool in MIS Savannah that lists NCSA Civil Service (CS) and Academic Professional (AP) employees, as well as Post-Doctoral (PDoc) employees, and Academic hourly (AcHr). To access Staff Plan, log into www.internal.ncsa.illinois.edu.

Before using this tool and making any staff plan changes, NCSA leadership stresses that you MUST have the necessary conversations with the Principal Investigators (PIs) who oversee the funds affected by the changes you are proposing. Please do NOT increase or decrease spending on any fund without first consulting the respective PI and business office contact, to make sure that:

- We are compliant in the spending.
- Your proposed change is a true reflection of the effort and the work being done.
- Your proposed change will not cause the project to be overspent according to the approved budget.

LOCATING STAFF PLAN TOOL IN SAVANNAH

Staff Plan can be found by expanding the Financial/Business menu as shown below:



HOW TO UPDATE THE NCSA STAFF PLAN

LOCATING AN EMPLOYEE'S STAFF PLAN

Once in the Staff Plan tool, locate the “Listed Employees” block in the center of the screen. The employees are listed in alphabetical order by last name. If you do not see any employees listed, please contact the business office at faaccount@ncsa.illinois.edu to request access.

The screenshot shows the NCSA Savannah Staff Plan tool interface. The 'Listed Employees' tab is highlighted with a green box. The interface includes a sidebar with 'Reports' and 'Related Tools' sections, and a main area with a table of employee details.

Name	Group	Type	UIN
Abueidda, Diab	IAD	PDoc	652560462
Adamow, Monika	DES	AP	664810140
Adams, Darren	AAS	AP	655815658
Agrawal, Kapil	NERD	AP	669000457
Alameda, Jay	AAS	AP	651485259
Allen, Gabrielle	RE	AP	673928043
Allen, Joshua	NCSAGEO	AP	676067230
Andrews, Neil	PMCO	AP	679125276
Arnold, Galen	SEAS	AP	658684307
Auvil, Loretta	IndPro	AP	650104086
Avila, Kristina	IRST	AP	656292039
Avila-Diaz, Leandro	IRST	AP	668659886
Azoff, Justin	IRST	AcHr	660106587
Banerjee, Alina	IDDS	AP	658439913
Barklev, June	Fin	CS	652261564
Basnev, James	CISR	AP	657448900
Bauer, Gregory	SEAS	AP	653194286
Belkin, Maxim	BWDev	AP	671047344
Blatti, Charles	VA	AP	659198253
Bliss, Brian	NCSAGEO	AP	666799837
Blum, Kimberly	IDDS	AP	653277729
Bobak, Michael	SD3	AP	654702613
Bock, David	DAV	AP	656475266
Bode, Brett	BWDev	AP	667863438
Boerner, Timothy	XSEDE	AP	654366585
Boesche, Angela	CrtvSrvs	CS	668093513
Borkiewicz, Kalina	AVL	AP	667976546
Bouvet, Timothy	SysAdmin	AP	657304230
Boyer, Eric	NERD	AP	662527816
Bradley, Shannon	PMCO	AP	667679247
Brunner, Robert	SEAS	AP	656391881
Burnette, Maxwell	SADL	Unpd	673464176
Bushell, Colleen	HIPO	AP	653676785
Buskuehl, Ellen	TMG	CS	674648769
Butler, Michelle	LSSTCS	AP	656301837
Cai, Yandong	DA	AP	653585668
Calderon Rivera, Diego	ReSALT	AP	652744554
Carpenter, Jeffrey	AVL	AP	650869009
Carrasco Kind, Matias	LSSTCS	AP	653529804
Carswell, Brandon	ITS	AP	674210271
Christensen, Andrew	AVL	AP	670750885

To locate the person whose staff plan you want to edit:

1. Scroll down to the employee's name, or
2. "Ctrl F" and type a portion of the employee's name.

Click on the name and MIS will take you to that person's staff plan page for editing:

HOW TO UPDATE THE NCSA STAFF PLAN

Home > Staff Plan > Edit Employee

Name (CS) UIN

Salary

8/15/19 - 6/30/24

\$64,500

Change salary to \$ [] on Feb 16 2019 until Aug 15 2024 Proceed



Pay Distribution

7/1/19 - 6/30/21 (100%) [HRT] [CFOPA]

1-100020-320000-320003-A02 100% [CFOPA]

Hide historical salary distributions Update View

This screenshot has been altered to hide the name and UIN of this employee, but this page includes the following information:

- **Employee name**
- **Employee type abbreviated inside the parenthesis, which refers to their classification:**
 - CS: Civil Service
 - AP: Academic Professional
 - PDoc: Post-Doctoral
 - AcHr: Academic Hourly
- **Time period**
- **Salary**
 - **Note: Do not attempt to put edits in the “Change salary to” line. This is reserved for HR.*
- **Pay distribution**, which identifies the employee’s salary allocation percentages and CFOPA(s).
 - CFOPA is an acronym for Chart-Fund-Org Code-Program Code-Activity Code. Be sure to include the correct Activity Code – your business office contact can assist with the proper Activity Code.
 - Date block, which designates a column for the allocations that occur between the dates in this block
 -  This is the HRT icon – you must click this icon to submit an HRT (see page 9).
 -  This is a CFOPA allocation icon.
 - Clicking this icon from the date block copies the entire group of CFOPAs from that date block column and auto-populates them into the “change accounts to” box (see page 4).
 - Clicking this icon at the end an individual CFOPA will auto-populate ONLY that single CFOPA in the “change accounts to” box.

In this example, we can see that from the time period of 07/01/2019 to 06/30/2021, 100% of this employee’s salary is paid on 1-100020-320000-320003-A02.

HOW TO UPDATE THE NCSA STAFF PLAN

UPDATING STAFF PLAN

To update the Staff Plan, scroll down to the bottom of the “Pay Distribution” block to find the section called “Change accounts to”:

NCSA savannah

Home > Staff Plan > Edit Employee

Name (CS) UIN

Salary

8/15/19 - 6/30/24
\$64,500
Change salary to \$ on Feb 16 2019 until Aug 15 2024 Proceed

Pay Distribution

7/1/19 - 6/30/21 (100%)
1-100020-320000-320003-A02 100%

Hide historical salary distributions Update View

Change accounts to:

Account	Percent	
- - - - -		Add

Start date: Mar 23 2020
End date: Jun 30 2024
Comments/explanation:
Proceed


Replace entire account

Notes

Save

HOW TO UPDATE THE NCSA STAFF PLAN

Enter the following information (all these fields are mandatory):

1. CFOPA in the “Account” column.
 - a. Enter the correct codes in the separate boxes from left to right:
 - i. Chart – Fund – Org – Program – Activity.
 - ii. Note: some non-NCSA funds will not have an activity code. This is allowable and will not cause a problem.
 - b. There are several ways to fill in CFOPAs:
 - iii. Click “Add” if needing to insert an additional CFOPA.
 - Enter the desired CFOPA and percentage into the blank fields.
 - iv. Click the dollar bill icon  either from the date block or from an individual CFOPA from their staff plan (see page 3).
 - CFOPA(s) auto-populates into the fields.
 - If for some reason, you need to change one of the fields of the CFOPA (i.e., change in activity code, etc.), simply type over the existing numbers.
 - c. *Note: Consult your business office contact person to confirm CFOPA codes.
 - d. **Note: **IT IS IMPERATIVE** that you use correct CFOPA codes. Savannah will not prevent rogues and will not stop you from entering incorrect codes.
2. Allocation percentage in the “Percent” column for each CFOPA line (type over existing numbers, if necessary)
3. Start date of allocations change (drop-down menus for month, day and year)
4. End date of allocations change

If changes are being made beyond the end date of one of the projects the employee is being paid from, the system will not allow you to proceed with your chosen end date but will edit your end date to reflect the latest possibility (the end date of the project that will end the soonest).

For example, suppose today’s date is 5/1/2020 and suppose a person is currently being paid from a state line and a grant that ends May 31, 2020. In staff plan, suppose we want to add funding from a second grant that ends February 28, 2021. If we choose 2/28/21 as our end date, MIS will disallow this edit, and will change our end date to 5/31/2020, the end date of the first grant.
5. Enter comment(s) – Since staff may work on multiple funds at one time, it is critical to explain why we are making any allocation adjustments:
 - a. Groups should use the names of their projects and notate what activity codes are changing or what funds are being increased, decreased, beginning, ending, etc. as part of the staff plan change.
 - b. These comments explain the importance of these changes, which helps document the Human Resource Transaction (HRT).
 - c. Savannah will not allow you to submit these changes unless there are comments in this box.

HOW TO UPDATE THE NCSA STAFF PLAN

NCSA savannah™

Home > Staff Plan > Edit Employee

Name (CS) | UIN

Salary

8/15/19 - 6/30/24
\$64,500
Change salary to \$ on Feb 16 2019 until Aug 15 2024 Proceed

Pay Distribution

7/1/19 - 6/30/21 (100%)
1-100020-320000-320003-A02 100%

Hide historical salary distributions Update View

Change accounts to:

Account				Percent	
1	100020	320000	320001 - 320D14	80	Add
1	100020	320000	320003 - A02	20	Remove

Start date: Mar 16 2020
End date: Apr 15 2020
Comments/explanation:
Transferring time to the 320D14 to reflect expenses incurred during the COVID pandemic

Proceed
Replace entire account

Once all fields are updated, click “Proceed.”

HOW TO UPDATE THE NCSA STAFF PLAN

The following screen will show what the new allocation will look like in Staff Plan:

Home > Staff Plan > Edit Employee

Name | (CS) UIN

Salary

8/15/19 - 6/30/24

\$64,500

Change salary to \$ on Feb 16 2019 until Aug 15 2024 Proceed

Pay Distribution

7/1/19 - 3/15/20 (100%)	3/16/20 - 4/15/20 (100%)	4/16/20 - 6/30/21 (100%)
	1- 100020- 320000- 320001- 320D14 80%	
1-100020-320000-320003-A02 100%	1- 100020- 320000- 320003- A02 20%	1-100020-320000-320003-A02 100%

Does the timeline above reflect the changes you would like to make?
(The changes will not be auto-spawned as an HR Transaction, the HR Transaction must be manually created)

⚠ This employee is paid biweekly, so it is recommended that distribution changes be made on the biweekly pay cycle start/end dates.

The suggested pay cycle start date is 03-08-2020
The nearest ending pay cycle date is 04-18-2020
To make this recommended change, press cancel, and set the dates accordingly

Transferring time to the 320D14 to reflect expenses incurred during the COVID pandemic

Confirm change Cancel

Savannah asks if the timeline reflects the changes you would like to make. If yes, click “Confirm change,” and the staff plan will show the timeline as shown above. If no, click “Cancel,” and make the correct changes.

Notice the recommendations Savannah is making in this example. This employee is classified as civil service and is paid bi-weekly. Savannah is suggesting that we use a different allocation period to match the employee’s pay period for ease of accounting. If you wish to accept Savannah’s suggestion, make a note of the dates, click “Cancel,” and start over. If you wish to reject Savannah’s suggestion, and have confirmed the page for accuracy, click “Confirm change”.

HOW TO UPDATE THE NCSA STAFF PLAN

Note: OBFS payroll date schedule may be found at: <https://www.obfs.uillinois.edu/payroll/schedules/> “MN” refers to the monthly pay schedule (i.e., for Academic Professionals) and “BW” refers to the bi-weekly pay schedule (i.e., for Civil Service).

Note: Savannah does not generate any date suggestion for employees who are paid monthly (APs), but NCSA business office prefers using these start dates and end dates, when appropriate:

Start dates: 1st and the 16th of the month

End dates: 15th and the last day of the month

28th – February

29th – February, during a leap year

30th – April, June, September, November

31st – January, March, May, July, August, October, December

HRTS: AUTO-GENERATED VS. MANUALLY SUBMITTED

Now that you have changed staff plan, you may also need to submit a Human Resource Transaction (HRT). The need to manually process an HRT depends on when the transaction will occur.

- **If the change occurs in the future (more than two weeks before the next payroll processing date), Savannah will automatically generate an HRT.**
 - You DO NOT have to manually create an HRT, and you will receive the following message:
 - “The changes will automatically spawn a change of funding HR Transaction on [DATE]”
 - Savannah will also prohibit you from creating an HRT manually if one is not necessary.
 - For example, if today’s date is March 23, and if the change in funding will have a start date of April 16, 2020, then the system will automatically generate an HRT to go through the approval process.
 - Payroll processing dates are listed here: <https://www.obfs.uillinois.edu/payroll/schedules/> under column J – the ‘job change system cut-off’.
- If the change occurs within two weeks of the next payroll processing date:
 - You DO have to manually create an HRT, and you will receive the following message, as seen in the example on the previous page:
 - “The changes will not be auto-spawned as an HR Transaction; the HR Transaction must be manually created”
 - **If the change occurs in the past and is carrying on into the future:**
 - You DO have to manually create an HRT, and you will receive the following message, as seen in the example on the previous page:
 - “The changes will not be auto-spawned as an HR Transaction; the HR Transaction must be manually created”

If HRTs are not properly generated, as applicable, staff plan and the personnel tool will be out of sync, which will lead to errors. The business office will reach out to managers if problems arise with staff plan configurations.

HOW TO UPDATE THE NCSA STAFF PLAN

Manually Creating an HRT

To manually create an HRT, click on the blue calendar box (circled in green) as shown here:

The screenshot shows the 'Edit Employee' page for NCSA Savannah. The 'Pay Distribution' section is active, displaying a distribution for 7/1/19 - 6/30/21 (100%) with a salary of \$64,500. A blue calendar icon is circled in green, and a text box below it says 'Create HRT based on this change of funding'. Below this, there is a table for 'Change accounts to:' with columns for 'Account' and 'Percent'. The start date is set to Mar 23, 2020, and the end date is Jun 30, 2024. There is a 'Proceed' button and a checkbox for 'Replace entire account'.

The HRT page will pop up, which gives us the opportunity to check all information for accuracy (dates, CFOPAs, etc.).

HOW TO UPDATE THE NCSA STAFF PLAN

The screenshot shows the 'New HRT' form in the NCSA Savannah HR system. The form is divided into several sections:

- Transaction Type:** Radio buttons for Change of Funding, New Position, Reclassification or Promotion, Vacancy, Zero Percent Appointment, Equity Increase, New Visiting Scholar, Reappointment, and Other.
- Position Type:** Radio buttons for Academic Hourly, Academic Professional/Civil Service, Extra-help, Graduate Hourly, Graduate Research Assistant, Undergraduate Hourly, Research Experience for Undergrads (REU), Post-Doc, and Faculty.
- Organizational Unit:** A dropdown menu with 'Admin/BO/Services' selected.
- Incumbent Login:** A text field with 'riche Lu (ricu)' entered.
- Additional Info:** Fields for Current salary, UIN (651220147), Start Date (5/3/2020), and End Date (7/8/2023).
- Existing Funding:** A section with a green plus icon, showing account details and a 'Percent on this account' field set to 100.
- Proposed Funding:** A section with a green plus icon, showing account details and a 'Percent on this account' field set to 100.
- Required Documents:** A section with a 'Justification for funding change' text area and a note: 'A justification is required. Also included any related HRTs.'
- Additional Files:** A section with a 'Comments and/or Advertising Requests' text area containing the text: 'Updated per FY20 NCSA Budget Summary - schronis_2020-09-04'.
- Files:** A section with a 'Choose File' button, 'No file chosen', 'File Description' field, 'Add another file' button, and a 'Submit' button.

After checking for accuracy, scroll to the “Comments and/or Advertising Requests” box towards the bottom of the page. Cut and paste these comments into the box directly above, in the “Justification for funding change” box.

Scroll to the bottom of this form and click the “Submit” button.

HOW TO UPDATE THE NCSA STAFF PLAN

If there is a problem with the HRT, you will receive an error message and the HRT will not be submitted. Editing staff plan incompletely is a common reason for receiving this error, such as omitting the allocation percentage. If this happens, make note of the issues causing the error, close the browser, re-access Savannah staff plan, correct the errors, recreate the HRT and click "Submit."

If there are no problems, you will get a message that the HRT has been submitted. This action will activate the HRT approval process.

FORECASTING STAFF PLAN FOR TWO YEARS

NCSA leadership has determined that employee staff plans should be 100% allocated for at least two years into the future in order to be as prepared as possible for changing events, projects and funding. In an effort to maintain the two-year staff plan projections currently in place, the business office will reach out to all managers twice each year to complete the task of projecting all staff plans out for the subsequent six-month period. Neglecting this task can prove to be detrimental to successfully projecting financial needs and necessary funding to sustain operations.

To assist you with forecasting and staff plan projections, the business office has created placeholder accounts for you to use in the event that you do not have a viable CFOPA to carry out allocations a full two years into the future. The following reasons are permissible scenarios in which to use a placeholder account in staff plan:

1. A project is beginning in the future, but the CFOPA has not yet been assigned.
2. A project is ending in the future and it is not yet known what new project will replace it.

Be advised: there is no funding in your placeholder account. While the placeholder account is available for your use as described above, it should never be approved in an HRT. Expenses should not be incurred on the placeholder account.

You should also only use the placeholder account assigned to your directorate. See the table below for the FY21 placeholder CFOPAs:

Division	Placeholder Account CFOPA
ICI	1-100021-320000-320001-A01
User Services	1-100021-320000-320001-A02
Engagement	1-100021-320000-320001-A03
Software	1-100021-320000-320001-A05

Please consult the business office for any questions regarding your placeholder account.

HOW TO UPDATE THE NCSA STAFF PLAN

WHO TO ASK

If you have any questions at any time with a staff plan change, please ask your business office contact person for help. We are happy to assist in providing additional instruction for editing staff plan.

Please use this list as a guide for whom you should contact regarding staff plan assistance. Thank you.

- Amy Morgan, Grants Lead – Blue Waters amorgn@illinois.edu
 - Debra Greer – Software division ddgreer@illinois.edu
 - Janessa Gentry – Proposals janessag@illinois.edu
 - Shawn Quigley – R/E sfquigle@illinois.edu
 - Cheryl Williams – ICI, User Services cwharris@illinois.edu
 - Vacant – XSEDE, Delta amorgn@illinois.edu
- Matt Schuldt, Services Lead – Industry mschuldt@illinois.edu
 - Richelle Lu – LSST, Services rlu@illinois.edu
- Janet Smith, Finance Lead - Administration jlsmith6@illinois.edu