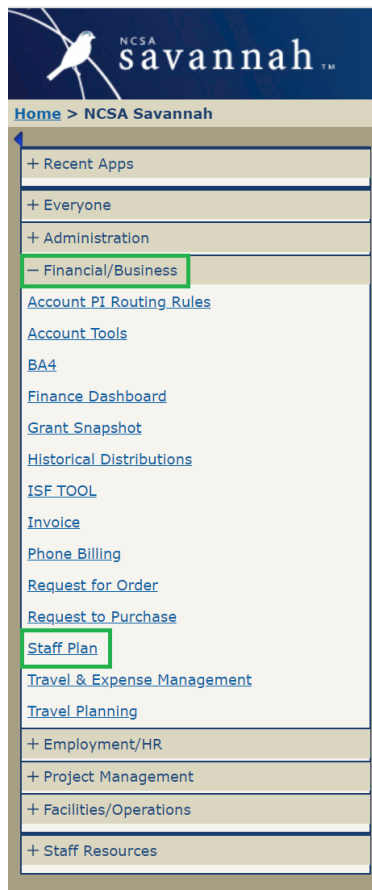# How to Update the Staff Plan

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 hourlies (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:

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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.

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:

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.

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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":

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.

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Once all fields are updated, click "Proceed."

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

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".

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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:**
        o   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.

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Manually Creating an HRT

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

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

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.

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

NSCA 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.

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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