Budget Prep Lessons Learned
June 8, 2021
Housekeeping

• Please remain on mute unless asking a question
• This meeting will be recorded
Agenda

• Planned Fixes and Enhancements
• Changes for Discussion
• Changes for Schedule G-1
• Other Requests
Planned Fixes and Enhancements

• Add maximum for Retirement Calc
  – New field in Fringe Setup
  – Updates to Fringe Calc

• Change to import all earnings codes from Dept Budget Table
  – Currently only included if they have matching Compensation entry
Planned Fixes and Enhancements

• Fix Budget Adjust field hours adjustment
  – Field still applies hours adjustment for biweekly positions
  – Updates to Personal Services page, Raise Upload, Reset Raise

• Fix Budget Amount Override
  – Will be editable with Override checkbox only
Planned Fixes and Enhancements

• Fix year input on G and G-1 Run Control pages
  – Currently the page changes year to match BP Setup

• Fix HCM Export Funding End Date
  – Will update to pull from Combo Code setup
Planned Fixes and Enhancements

• Add and Update Audit scripts
  – New Audit for employees that have changed positions
  – New Audit for staged Job Data has inactive HR Status
  – New Audit for inactive HR Dept on Position
  – New Audit for planned Retirement Date is before Effective Date
Planned Fixes and Enhancements

• Audit Scripts (Continued)
  – New Audit for NAHRLY Comp rate with non-H Comp Rate Frequency
  – Update Job Audit for future row exists, currently uses “greater than or equal to”

• Remove Change Amount/Change Percent from BORBLOAD
Changes for Discussion

• HCM Import Discussion Prompts
  – Should the process:
    • Force H/J Paygroup to be NAHRLY Comp?
    • Back out prior year hours adjust on Vacancies before applying new year hours adjust?
    • Merge Multiple Comp Rate Code Effective Sequences?
    • Check General Deductions > 0 before importing Health Benefit?
Changes for Discussion

• Update Personal Services Page Prompts
  – Should the page:
    • Only allow positive raises
      – or –
    • Require the Job export skip flag if negative raises exist
  – FTE = 0 causes issue with Hourly Rate Calc
Changes for Discussion

• Fringe Update
  – Use LIFE_INS flag to control Health Insurance calc?

• Update Non-Personal Services
  – ORG budget validations?
Changes for Discussion

• HCM Export
  – Should the process force EARNS_DIST_TYPE ‘A’ if non-REG entry exists?

• Other
  – W Paygroup Budgets
G-1 Updates

• Clean up code

• Any fixes or feature requests?
Other Requests?