

Luma Budget Quick Reference Guide (QRG)

Group & Temporary (4300)

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Initiator: Any budget employee

Reason: Report on any group/temporary positions and plans for the next fiscal year for their agency.

General Notes:

- This form allows information to be loaded into the system to then show on the “Personnel Cost Forecasting (PCF)” report.
- This is one of many budget forms in the system that provides information to the PCF report. They are the following:
 - Line Item & Supplemental Requests (5100)
 - DU 8 Series Transfer (5600)
 - Vacant & Other PC Adjustments (6300)
 - Salary & Benefit Changes (6200)
 - Position Allocation (8100)
- These forms will complete the Personnel Costs (PC) values, which upload to the PCF report.

Note: You do not need to complete this form if your agency does not have a PC expense in your base budget for Group/temporary positions or any other adjustments that need to be made/reported.

Create a Parent Entry

1. Select form 4300 from the form dropdown menu to open the form’s summary overview screen.
 - This screen will list all entries matching the stages (workflow steps) associated with the user's access in the system.

15. Group & Temporary (4300)

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#)

Form ID	Description	Stage	Agency	Form Rows	Last Update	Last User	Submit	Actions
3354	Department of Fish and Game	4301	260	24	3/16/2021	jessa.gonzales@	Submit	Header Detail Delete

2. Click **Add New** to open the “Create a new Budget Form – 4300” Screen.

3. Select the appropriate **Stage** and **Agency**.
 - Not all budget forms start in Stage 1.
 - Agencies you have permission to access will appear in the field's lookup tool.

The screenshot shows a dialog box titled "Create a new Budget Form - 4300". It has a "Close" button in the top left. The main area contains two required fields: "Stage:*" with a dropdown menu showing "Select a Stage Code", and "Agency:*" with a text input field, a magnifying glass icon, and a blue "X" icon. At the bottom are "Save" and "Cancel" buttons.

4. Click **Save** to proceed to the "Budget Form Header" screen.

Note: Form 4300 does not have narrative description fields. If additional explanations are required, utilize the "Attachments" tab to upload supporting documentation.

5. Select the "Group Positions" tab to access the Form Positions screen.

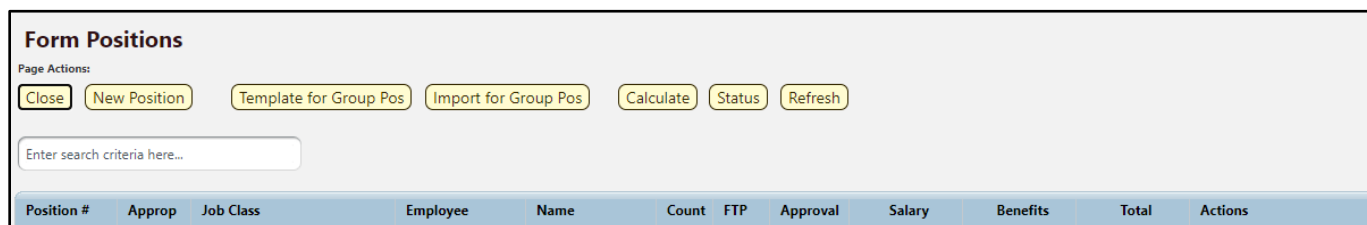
The screenshot shows the "Budget Form Header" screen. At the top are buttons for "Comment History", "Comment", "Submit", and "Close". Below is a table with the following data:

Instance ID	Form Definition	Definition Name	Name	Agency
3071	4300	15. Group & Temporary (4300)	State Treasurer	150

Below the table are two input fields: "Stage Code:*" with the value "4301" and "Initial Entry" below it, and "Agency" with the value "150" and "State Treasurer" below it. There are four tabs: "Header", "Detail", "Group Positions" (which is circled in red), and "Attachments". Below the tabs is a "Name:*" field with the value "State Treasurer" and a "Save" button. At the bottom is a large text area labeled "Analyst's Comments".

GROUP POSITIONS TAB

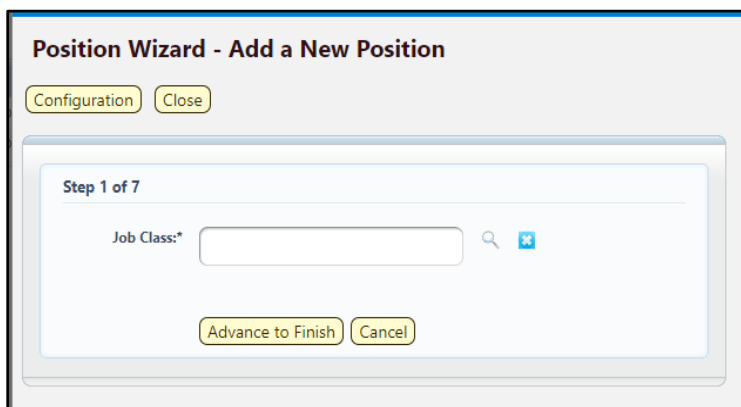
This tab enables agencies to enter Group/Temporary positions. This can be done via the “New Position” utility or by importing a populated template worksheet.



The screenshot shows the 'Form Positions' interface. At the top, there's a title 'Form Positions' and a section for 'Page Actions' with buttons: 'Close', 'New Position', 'Template for Group Pos', 'Import for Group Pos', 'Calculate', 'Status', and 'Refresh'. Below this is a search bar labeled 'Enter search criteria here...'. At the bottom, there's a table header with columns: 'Position #', 'Approp', 'Job Class', 'Employee', 'Name', 'Count', 'FTP', 'Approval', 'Salary', 'Benefits', 'Total', and 'Actions'.

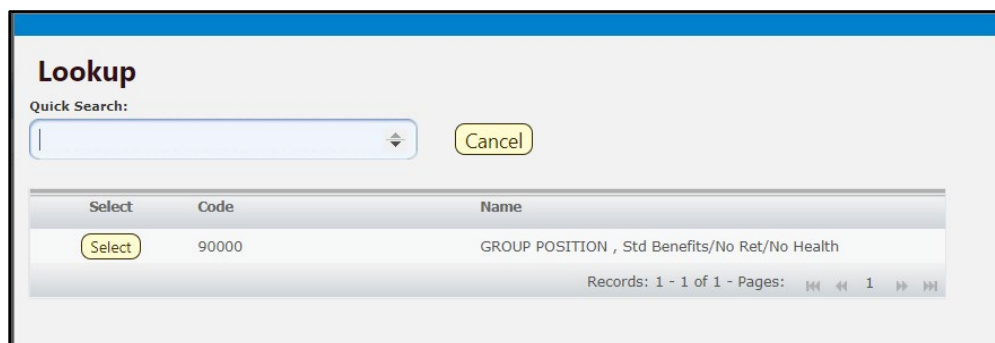
Adding a Position with the “New Position” Action:

1. Click **New Position** to open the “Position Wizard - Add a New Position” screen.



The screenshot shows the 'Position Wizard - Add a New Position' screen. It has buttons for 'Configuration' and 'Close'. The main area is titled 'Step 1 of 7' and contains a 'Job Class:*' label next to a text input field. To the right of the input field are search and help icons. At the bottom, there are 'Advance to Finish' and 'Cancel' buttons.

2. Select a Job Classification.
 - Group/Temporary Positions can only be classified with code 90000.



The screenshot shows a 'Lookup' window. It has a 'Quick Search:' label and a text input field with a dropdown arrow. To the right is a 'Cancel' button. Below the search bar is a table with columns: 'Select', 'Code', and 'Name'. The table has one row with the following data: 'Select' (with a 'Select' button), '90000', and 'GROUP POSITION , Std Benefits/No Ret/No Health'. At the bottom right, it says 'Records: 1 - 1 of 1 - Pages: 1'.

Note: Standard Benefits include; life insurance, workers’ comp., Medicare, and Social Security expenses. Report on any health and retirement costs of any benefitted group position(s) in the “Detail” tab. The total amount of any non-standard benefits for Group/Temporary workers can be entered in as a lump sum entry.

3. Click **Advance to Finish** to open the “Position Wizard”.

4. Fill out the “Add a New Position Form”:

- **Type:** Select position type “Board & Group Positions”.
- **Vacant Option:** Defaults to 1:1.
- **Step:** Select the step policy code for this position (n/a for group temp positions).
- **Salary Override:** Check this box to enable salary override.

Note: These positions have no set paygrade and will default to \$100,000 unless “Salary Override” is selected.

- **Override Salary:** Enter the salary for this position.
- **Employee Count:** Enter the number of positions being requested.
- **% Full Time (100%=1.00):** Enter 0 (Zero) for Group and Temporary positions to prevent them from being added to the overall FTP count.
 - If the position is an increase to the base budget, use the same entry methodology when requesting a group position in the “Supplemental & Line Item Request (5100)” form.

Note: In these “Position Wizard – Add a New Position” example images, three Group/Temporary positions with Standard/Health Benefits are being requested with an annual salary of \$50,000.00. The funding source is set as the Administration Appropriation Unit in the General Fund.

Position Wizard - Add a New Position

Combined Wizard Steps 2 - 7

Position Code:* NEWP-864147 Job Class:* 90000
GROUP POSITION , Std Benefits/No I

Position Fields

Position Name:* GROUP POSITION , Std Benefits/N Type:* 2 - Board & Group Positions

Vacant Option: 1:1 Step:* 2
80% of Policy
Lookup Salary Table

Salary Override:* ☐ Override Salary:* \$50000.00

Employee Count:* 3 % Full Time (100%=1.00)*: 0

Finish Cancel

- **Approp:** Select the appropriation unit (AU) applied to this position.
- **Fund:** Select the applicable fund for this position.
- **Org Unit** (optional): Additional level of reporting detail. Defaults to 0 (zero).
- **Decision Unit:** Defaults to 0 (zero).
- **Program** (optional): Additional level of reporting detail. Defaults to 0 (zero).
- **Project** (optional): Additional level of reporting detail. Defaults to 0 (zero).
- **Account:** This field will default to 501. **Do not change this value.**
- **OG/OT:** Select either Ongoing (default) or One-Time.

5. Click **“Finish”**.

6. The “Form Positions” screen will now list the new group positions. Click **Calculate** to populate the salaries and the standard benefits.

- Calculations can take 45 seconds or longer to populate.

Note: Do not click calculate more than once. If you do, you will restart the calculation and delay your results.

- Click **Status** to review the progress of the calculation.
- Once calculated, you may click **Refresh** to update listed data.

The screenshot shows a web form with the following fields and values:

Field	Value	Label
Approp:*	STAA	State Treasurer
Fund:*	10000	General Fund
Org Unit:*	0	Not Assigned
Decision Unit:*	0	None Needed
Program:*	0	Not Assigned
Project:*	0	Not Assigned
Account:*	501	Employees - Temp
One-Time / On-Going:*	OG	On-Going

Form Positions

Page Actions: [Close](#) [New Position](#) [Template for Group Pos](#) [Import for Group Pos](#) [Calculate](#) [Status](#) [Refresh](#)

Enter search criteria here...

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval	Salary	Benefits	Total	Actions
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1468 (0)	Form Position	1	0.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1469 (0)	Form Position	1	0.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results
NEWP-268787	STAA	90000-GROUP POSITION , Std Ben	Z1470 (0)	Form Position	1	0.00	True	\$0.00	\$0.00	\$0.00	Edit Unapprove Results

Note: Click the **Edit** button next to a position to make changes to that position's Salary, Funding Dates, and Allocation settings.

- e.g. Changing a position from full-time (100% = 1.0) to part-time (50% = .50) can be accomplished using the Edit function.
- Do not use this form to change a group position into a part-time permanent position. This should be done using the Line Item & Supplemental Requests (5100) form.
- Edits can be made at any time, even while a calculation is processing.

Edit Form Position

Page Actions: [Close](#) [Manage Funding Date and Allocation Records](#) [Audit Trail](#)

BFM_I00001 - Z1470 was successfully updated.

Position	Employee Code	Last Name	First Name	Home Orgn	Job Class
NEWP-268787	Z1470	Form Position		STAA	90000

Employee Code:* Last Name: First Name: MI: [Save](#)

Employee [Salary](#)

Salary Table: **Non-Classified**

Grade: **Grade 00**

Step: **80% of Policy** [Lookup Salary Table](#)

Salary Override: ☒

Override Salary:

Non Step Table: **Temporary Employees**

Salary Percentage:

Benefit Percentage:

Employee Count:

% Full Time (100%=1.00):

2. Review the listed Form Position entries for accuracy.
 - When a 90000-job class is selected, the system will calculate standard benefits. This breakdown can be viewed by clicking the **Results** button.

Exporting and Importing Group Positions:

- New group positions can be entered via this method.
 1. Click the “Group Position” tab to open the “Form Positions” screen.
 2. Click the **Template for Group Pos** button to download a preformatted Excel worksheet template.

Position #	Approp	Job Class	Employee	Name	Count	FTP	Approval
NEWP-383278	777C	90000-GROUP POSITION - Std Ben	Z1825 (0)	Form Position	1	0.00	True

3. Fill in the template with the new group position information.
 - Use a “GP” designation for a Group Position, followed by your agency number and a counter. This methodology identifies a position entry as a group position.

	A	B	C	D	E	F	G	H	I
1	Position Number*	Job Class*	Salary Amount*	Approp*	Fund*	Org Unit*	Program*	Project*	Alloc % * (100 = 100%, 50=50%)
2	GP42700002	90000_N	30000	STAAS	10085				100

Note: A position number cannot be used more than once. Use an easily identifiable position number system within your agency, especially if more than one person is entering or transferring these positions.

4. Click **Import for Allocation Change** to open the “Administrator Upload” screen.
5. Click **Browse**, then locate and select the file you just filled in and saved.
6. When the file is selected, click **Load Selected File**.
7. Close the import screen, and the data will have been uploaded to “Form Positions”.
 - A notice will display if there is a validation issue.
8. The “Form Positions” screen will list the new group positions. Click **Calculate** to populate the salaries and the standard benefits.
 - Calculations can take 45 seconds or longer to populate.
 - Click **Status** to review the progress of the calculation.
 - Once calculated, you may use **Refresh** to update listed data.

Upload Type:	File Type:	File Configuration:
POSTAB_GP	BFM XLSX Export	File has a Header Row

Browse

Load Selected File

9. Review the "Form Positions" list for accuracy.
 - Click the **Edit** button next to a position to make changes to that position's salary, funding dates, and allocation settings.

Note: Positions cannot be deleted from the "Form Positions" list. **Unapprove** the position instead, this will zero out its salary and benefits. Alternatively, you can delete the entire parent transaction and begin anew.

Calculate CEC and Variable Changes for Overtime Using a Placeholder Position

1. Create a new vacant position using the **Import** utility.
2. Click the position's **Edit** action button.
3. Set "% full time" to **0.00** this will remove the FTP from the position.
 - Keep the "positions" value at 1 as this allows the system to run the calculations.
4. Then set "**benefit %**" to **0.00**. This adjusts the % of fixed amount benefits that are assigned to a position.
 - The only fixed amount benefit we have in Idaho is health insurance.
 - This will remove the "additional" expense for health that would be created by adding the extra placeholder position.
5. Click **Calculate**, then validate the results.

DETAIL TAB

Accessed via the Budget Form Header of a parent entry, Detail has two main purposes:

- Adding lump sum group budget amounts instead of budgeting by position.
- Entry of additional benefits that are associated with Group/Temporary positions.
 - e.g. Noting any budgeted health benefits or CEC that is in the base budget.

Budget Form Lines

Close

Export

Import

Refresh

ID	Form	Agency	DU Summary	Form Name	FTP Balance	Transfer Balance
9425	5600	140 - State Controller	08.1x - FTP or Fund Adjustments	8. DU 8 Series Transfers (560	0.00	\$0

Quick Search:

Enter search criteria here...

Actions:

Add New

Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	Transfer #	FTP Adjustments*	Transfer Amount*	Comments / Notes
There are no records available.												

Records per page: 50

Records: 0 - 0 of 0 - Pages: 1

Note: If a request represents an increase to the base budget, they will need to be entered in the "Line Item & Supplemental Request" form (5100).

Making Other Adjustments

1. Select the “Detail” tab from the header screen to access the “Budget Form Lines” screen.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	Group Salaries	Group Benefits	Group Total
3801	4300	150 - State Treasurer	15. Group & Temporary (430)	\$155,000	\$10,000	\$165,000

Quick Search:
Enter search criteria here...

Actions:
Add New Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	Group Position Amounts*	Comments / Notes
There are no records available.										

Records per page: 50

Records: 0 - 0 of 0 - Pages: 1

2. Click **Add New** to open the “Budget Form Entry – Add New Line” screen.

Budget Form Entry - Add New Line

Page Actions:
Close

Form ID	Form Definition
3801	4300

Approp*: STAA
State Treasurer

Fund*: 10000
General Fund

Program: 0
Not Assigned

Project: 0
Not Assigned

OG / OT*: OG
On-Going

Account*: 513
Health Benefits

Org Unit:

Save Cancel

Comments / Notes:

Group Position Amounts*: 12930

Audit Text:

3. Fill out the form with the appropriate information before clicking **Save**.
 - Accounts that are appropriate to adjust on this form:
 - Employees - Temp (501)
 - Employee Benefits (512)
 - Health Benefits (513)

4. Review the salary and benefit totals at the top of the “Budget Form Lines” screen to ensure accuracy.
 - e.g. Below, health benefits have been added to a full-time group position.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	Group Salaries	Group Benefits	Group Total
3801	4300	150 - State Treasurer	15. Group & Temporary (43C	\$155,000	\$22,900	\$177,900

Quick Search:
Enter search criteria here...

Actions:
Add New Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	OG / OT*	Group Position Amounts*	Comments / Notes
1		STAA	10000	0	0	0	513	OG	12,900	

Records per page: 50

Records: 1 - 1 of 1 - Pages: 1

Note: Copy and Export/Import action buttons are available to ease data entry.

ATTACHMENT TAB

Selecting the “Attachment” tab will open the “Budget Form – Document Attachments” utility. Clicking **Add Files** will open a file explorer dialogue, allowing you to locate and select the document(s) you would like to upload to the form.

Budget Form - Document Attachments
Upload multiple files up to a maximum of 50 GB per file.

+ Add Files

File	Uploaded
No attachments	

Done

Note: You may upload multiple documents at once as long as they do not exceed the 50 GB file limit.

Result: You have successfully reported your plans for the upcoming budget year for group & temporary positions and/or made other adjustments to your PC amounts.

Additional training resources can be found on the SCO website’s Luma Budget Training page: <https://www.sco.idaho.gov/LivePages/luma-budget-support-and-training.aspx>

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