

Luma Budget Quick Reference Guide (QRG)

Salary & Benefit Changes (6200)

Salary & Benefit Changes (6200)

Initiator: Any budget employee

Reason: Manage salaries and benefits for positions at your agency.

General Notes:

- This form will already be populated with position information. This form is updated as changes are calculated in the Form Positions screen of other budget forms.
- This should be one of the last forms that is completed to ensure the most accurate information is being recorded.
- This form will calculate the salary and benefit changes related to personnel. This includes changes to health and variable benefit costs along with CEC, as provided in the Budget Development Manual.

Access Parent Entry Header

1. Select form 6200 from the form dropdown menu to open the form's summary overview screen.
 - This screen will display any unsubmitted or resubmitted parent entry outstanding for the user.

Salary and Benefit Changes (6200)

Quick Search:
Enter search criteria here... [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	Agency	Form Rows	Last Update	Last User	Submit	Actions
3352	State Treasurer	6201	150	0	2/9/2021	APPROP_USER	Submit	Header Detail Delete

Records per page: 50

Records: 1 - Page: 1

2. Click the **Header** action button on your agency's parent entry line to open the "Budget Form Header" screen.

HEADER TAB

3. Review the form fields for accuracy.
 - No description field is available for narrative entry, utilize the "Attachment" tab to upload necessary supplemental documentation.
 - The "Analyst's Comments" text field will be used by DFM and LSO.

Budget Form Header

Instance ID	Form Definition	Definition Name	Name	Agency
3352	6200	Salary and Benefit Changes (6200)	State Treasurer	150

Stage Code:* Agency
 Initial Entry State Treasurer

Name:*

Analyst's Comments:

4. Select the “Salary Changes” tab to open the “Budget Form Lines” screen.

SALARY CHANGE TAB

- This form is system generated for each agency.
- Both Header totals and Requested Changes columns will begin with a zero balance.

Budget Form Lines

ID	Form	Agency	Form Name	Total Salary	Total Health	Total Var Benefits
10387	6200	140 - State Controller	16. Salary & Benefit Chgs. (6	\$0	\$0	\$0

Quick Search:

Actions:

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	DU*	Account*	PCF Calculated Change	Requested Changes*	Comments / Notes
1		SCAA	10000	0	0	0	10.11	513	7,100	0	
2		SCAA	10000	0	0	0	10.12	512	4,500	0	

5. Click the **Copy Calc to Request** button to open the “Confirm to Run Copy Calc to Request” screen.
6. Click **Run** to populate totals at the top of the tab as copy and round “PCF Calculated Change” column totals to the “Requested Changes” column.

Confirm to Run Copy Calc to Request

Run the Copy Calc to Request Process

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	Total Salary	Total Health	Total Var Benefits
10387	6200	140 - State Controller	16. Salary & Benefit Chgs. (6	\$61,600	\$117,400	\$66,600

Quick Search:
Enter search criteria here...

Actions:
Add New Copy Calc to Request

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	DU*	Account*	PCF Calculated Change	Requested Changes*	Comments / Notes
1		SCAA	10000	0	0	0	10.11	513	7,100	7,100	
2		SCAA	10000	0	0	0	10.12	512	4,500	4,500	
13		SCCA	10000	0	0	0	10.11	513	21,800	21,800	
14		SCCA	10000	0	0	0	10.12	512	8,700	8,700	
15		SCCA	10000	0	0	0	10.61	500	10,400	10,400	

Records per page: 50 Records: 1 - 20 of 20 - Pages: 1

Note: This form can be updated with changes made to other forms (e.g. benefits and CEC related to vacant and/or group positions recorded on forms 4300 and 6300) by running another **Copy Calc to Request**. These updates will overwrite pencil edits made to line entries with their original values, reenter those changes as necessary.

7. Add Additional Line Entries as needed:

- **Add New:** This button will open the “Budget Form - Add New Line” utility, allowing the user to manually enter a new form line.
- **Export/Import:** Select **Export** to pull formatting and existing line information. Modify the form in Excel before selecting **Import** to upload your changes.
- **Pencil Edit:** Clicking the pencil icon at the end of a form line will allow the user to make quick edits to form line fields (e.g. Transfer Amount, FTP Transfers, and Dept. Transfer Code). 
- **Magnifying Glass:** Opens a contextual search utility that displays all available options for the field.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency
10387	6200	140 - State Controller

Quick Search:
Enter search criteria here...

Actions:
Add New Copy Calc to Request

Row	Audit Trail	Approp*	Fund*
1		SCAA	10000

Budget Form Entry - Add New Line

Page Actions:
Close

Form ID	Form Definition
3352	6200

Approp:* Fund:* DU:* Program: Project:

Account:* Org Unit: Save Cancel

Employees Not Assigned

Comments / Notes:*

Requested Changes*: Audit Text:

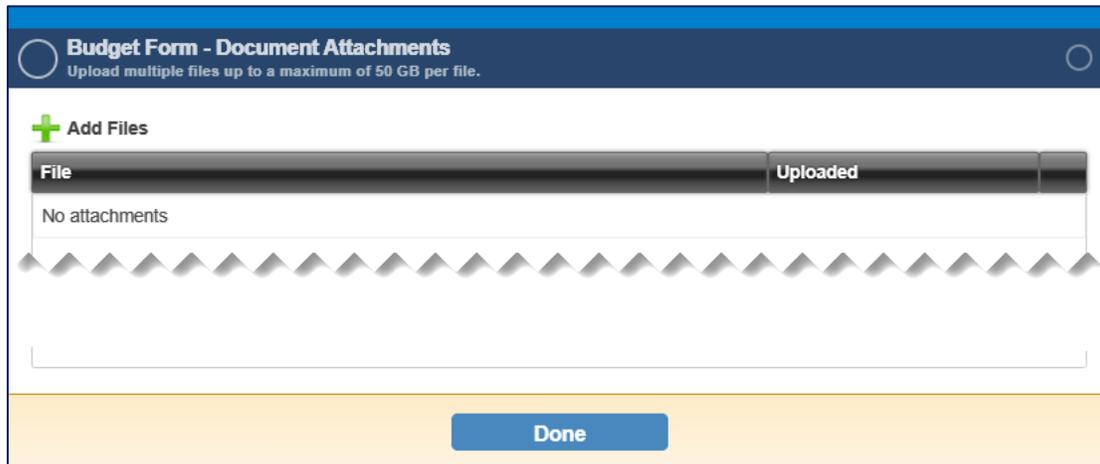
- **Approp:** Select the appropriation unit (AU) applied to this transfer.
- **Fund:** Select the applicable fund number for this transfer.
- **DU:** Select the Decision Unit associated with this transfer.
 - 10.13 = Other Benefit Changes
 - 10.19 = Employee Benefit Fund Shift

Note: Performing a re-calculation will erase any additions other than a 10.13 or 10.19.

- **Program** (optional): Select a program associated with the transfer if your agency enters their budget with that level of detail.
 - **Project** (optional): Select a project associated with the transfer if your agency enters their budget with that level of detail.
 - **Account:** Defaults to 500, the account number associated with this transfer.
 - **Org Unit** (optional): Select an organizational unit associated with the transfer if your agency enters their budget with that level of detail.
 - **Comments/Notes:** Add an explanation of the addition to this field.
 - **Requested Changes:** Amount that you are requesting be changed.
 - **Audit Text:** Comment fields, visible only on the form line audit history screen.
8. When required form fields are filled in, click **Save**.
 9. When finished, return to the summary overview screen and click **Submit**.

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.



The screenshot shows a web interface titled "Budget Form - Document Attachments" with a sub-header "Upload multiple files up to a maximum of 50 GB per file." Below the header is a green plus icon followed by the text "Add Files". Underneath is a table with two columns: "File" and "Uploaded". The table currently contains one row with the text "No attachments". Below the table is a large, empty rectangular area with a dashed border, likely a placeholder for a file explorer or a list of files. At the bottom of the interface is a blue button labeled "Done".

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

Result: You have reported salary and benefit changes within your agency.

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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