INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) USER GUIDE

SALARY CONTROL
Overview

The Salary Control form within IBIS is intended to show the current Authorized budget for salaries (as held in IBIS) compared to the current obligation for funded positions for each budget code, fund code and salary account code, as reported by the HR/Payroll system ("BEACON"). The difference between these two amounts is called Salary Reserve. Salary reserve varies during the year as employees are hired, separated, or given salary changes, including Legislative Increases (LI).

The Certified salary budget is initially set by the Legislature in each budget (usually July) and can be modified during the year by budget revisions. The new total, adjusted for budget revisions, becomes the Authorized budget.

In addition to salaries, the Salary Control form maintains the Authorized position count (IBIS FTE) which can be compared to the HR position count (Beacon FTE). Changes to the Authorized position counts must also be recorded on budget revisions.

The State Budget Act makes OSBM responsible for ensuring that permanent salary commitments do not exceed the Authorized budget amounts. The State Budget Act describes which kinds of changes OSBM is authorized to allow. The policies are explained in the State Budget Manual.

The reminder of this guide describes how to navigate and use the Salary Control form in IBIS.

Scope

Salary Control is provided for many – but not all – Accounts

IBIS Salary Control details are provided for Account in the 5311XX and 5312XX series only.

Notes and Updates

Interface to the HR/Payroll ("BEACON") system – Regular processing vs. Year-End Close Out

BEACON is the system of record for Position Salaries. BEACON sends a nightly, automated interface from BEACON to IBIS to report Position Salary amounts. Because this is an automated feed, IBIS displays the data exactly as it is received from BEACON.

During the fiscal year, under normal nightly processing, manual adjustment transactions in IBIS are not allowed, as these would just get wiped out by the next night’s interface overlaying the data. However, during the fiscal year-end close out, there may be a limited ability to do a manual adjustment when the BEACON interface is paused.
OSHR Mercer Project – June 2022

In June 2022, OSHR (through OSC), implemented the OSHR Mercer Project, which is an adjustment to classification salary ranges based on a salary survey. Based on implementing these new ranges, some employees have lower salaries than the new minimum starting salary for their Classification. The plan is for agencies to provide salary adjustments to bring affected Employees up to the minimum. However not all agencies have the funding to make these salary adjustments right away.

OSC will track employees that are under the new minimum but work for agencies that don’t yet have funding to increase the salaries through a new EXCLUDED list. This will stop the automatic matching of the Employee Salary to the Position Salary in BEACON each night for these Positions.

OSC considers this a temporary situation. As agencies have the funds, they will bring the employee up to the minimum for the salary range and then the positions will no longer be on the “Excluded” list.

At the time that the automatic matching for these Excluded employees was stopped, their Employee Salary and Position Salary were both exactly the same and will stay that way until an agency applies one of the special OSC-designated salary actions to bring the Employee to the minimum, or until the Legislative Increase (LI) salary action is applied. These are the triggers that OSC will look for, check if the Employee salary is now at or above the minimum and then remove the Employee from the Excluded list. This will then restart the matching of their Position salary to Employee Salary again.

It is important to note that IBIS receives the POSITION salary amounts from BEACON each night. If an agency has applied a salary action to an Excluded employee that is not one of the salary actions that OSC is expecting, it will not trigger the removal of the Employee from the Excluded list. This could cause IBIS to receive a lower POSITION salary than what the Employee is actually being paid.
Accessing and Using Salary Control in IBIS

Once you have successfully logged in, you should see the BRU Work Queue Page. This could also be an Agency Work Queue or OSBM Work Queue page depending on log-in credentials.

Under the Home window in the upper left-hand corner, click on Salary Control.
Once you click Salary Control, you will see the Salary Control form populate the right window pane of your screen as shown below. The top of the form has four columns: 1) Budget Code; 2) Fund Code; 3) Account; and 4) Transaction ID. Salary Control also has a Detailed View pane at the bottom of the form where you can view data selected from one of the top four columns. The Detailed View defaults to Auto, which means it displays budget codes when the form is first opened.
View the biennium field highlighted in the screenshot below. This will default to the current biennium. To change the biennium, click the dropdown arrow and select a new biennium. The Refresh button will need to be clicked to view data from another biennium.
View the fiscal year fields as shown in the screenshot below. The form defaults to selecting the first fiscal year of a chosen biennium. Select the fiscal year desired by clicking the radio button that corresponds to that fiscal year.

Click the Refresh button. You will see the Budget Code table populate with budget codes for the BRU and the bottom portion of the screen populate with budget code data. The bottom pane is set to default to show budget code information upon refreshing data. It will change automatically when fund, account or transaction ID is selected. It can also be changed manually by clicking the different buttons found in the middle of the screen listed by the Detailed View.
There are multiple ways to display data on the Salary Control form. A quick way to display budget code data is to hover over the budget code in the upper left portion of the screen. Doing so will display the following in a table: (Budget) Code; (Budget Code) Title; IBIS FTE; Beacon FTE; IBIS Budget; Beacon Salary; Salary Reserve; and Note #. This same information is displayed in the Detailed View portion of the form as highlighted below. The data displayed at this step will be summarized at the budget code level.
The form allows a user to enter a note at the budget code, fund code, and account levels. To add a note, double click a budget code displayed in the bottom pane. You will see the following window appear that allows you to add a note for the selected budget code. The note option is a way to acknowledge an issue and to communicate to stakeholders about the issue.

If adding a note is desired, click in the text field above the Add Note button and enter text. A position number can also be added to the note. Refer to the screenshot below.
The text can be formatted using the options available. The screenshot below shows text bold by selecting the text and clicking “B” from the formatting menu options.

To add a note, click the Add Note button. You will see a window appear asking if you wish to continue since notes cannot be deleted as shown in the screenshot below.
Click OK to add the note or cancel the action if adding is not desired. If you click OK, you will see the note added with a created date, time, user name and position number (if applicable). If you click Cancel, nothing is saved and you will return to the notes window.

If more notes are to be added, follow the same steps described above. If you wish to return to the form, click the Close button at the bottom of the screen. When you close the form after adding a note, you will see the Note# on the far side of the screen display the number of notes that have been added for that particular budget code, fund code or account as shown below.

![Image of detailed view](image)

To review fund code level detail, click on a budget code under the budget code header at the top of the form as shown below. You will see fund code information populate the fund code column of the form. The Detailed View will display the following in a table: (Fund) Code; (Fund Code) Title; IBIS FTE; Beacon FTE; IBIS Budget; Beacon Salary; Salary Reserve; and Note #. The data displayed at this step will be summarized at the fund code level.
The form allows a user to enter a note at the budget code, fund code, and account levels. Since the process to add a note is the same throughout the form, please refer to the instructions for adding a note described earlier in this user guide.

To review account level detail, click on a fund code under the fund code header at the top of the form as shown below. You will see account code information populate the fund code column of the form. The Detailed View will display the following in a table: (Account) Code; (Account) Title; IBIS FTE; Beacon FTE; IBIS Budget; Beacon Salary; Salary Reserve; and Note #. The data displayed at this step will be summarized at the account code level.
The form allows a user to enter a note at the budget code, fund code, and account levels. Since the process to add a note is the same throughout the form, please refer to the instructions for adding a note described earlier in this user manual.

Click on an account in the account column at the top of the form as shown below. You will see transaction data appear in the far-right column of the screen as well as the Detailed View portion of the screen. Transaction data will consist of any BEACON action or budget revision that affects positions within that budget code, fund code, and account combination.

The Detailed View tab with show the following columns: Code (i.e. system assigned transaction number), Actual Date (of the transaction), Effective Date (of the transaction), Position (number associated with the transaction), and the effect, if any, on IBIS FTE, Beacon FTE, IBIS Salary or Beacon Salary.
Click in the Position Search field in the upper right corner of the screen as shown below.

To search, enter a valid position number in the field and click the search button. If results are returned, you will see a search window appear with transactions that affect the positions searched as shown below.
<table>
<thead>
<tr>
<th>Budget Code</th>
<th>Fund Code</th>
<th>Account</th>
<th>Transaction</th>
<th>Actual Date</th>
<th>Effective Date</th>
<th>Position</th>
<th>IBIS FTE</th>
<th>Beacon FTE</th>
<th>IBIS Budget</th>
<th>Beacon Salary</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>13000</td>
<td>1100</td>
<td>531211</td>
<td>142234</td>
<td>11/01/2011</td>
<td>10/01/2011</td>
<td>60013650</td>
<td>0</td>
<td>0</td>
<td>$0.00</td>
<td>($1,446.00)</td>
<td></td>
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<tr>
<td>13000</td>
<td>1100</td>
<td>531211</td>
<td>396813</td>
<td>02/21/2014</td>
<td>01/01/2014</td>
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<td>0</td>
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<td>(110117)Budget Rev</td>
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<td>1100</td>
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<td>397112</td>
<td>02/22/2014</td>
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<td>60013650</td>
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<td>0</td>
<td>$2.00</td>
<td>$3,031.00</td>
<td>60013650 AT $7414.00</td>
</tr>
<tr>
<td>13000</td>
<td>1100</td>
<td>531211</td>
<td>419141</td>
<td>07/16/2014</td>
<td>07/01/2014</td>
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<td>0</td>
<td>0</td>
<td>$0.00</td>
<td>$7,410.00</td>
<td>60013650 AT $7414.00</td>
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<tr>
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<td>429109</td>
<td>09/22/2014</td>
<td>07/01/2014</td>
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<td>0</td>
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<td>$0.00</td>
<td>$0.00</td>
<td>60013650 AT $3225.00</td>
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<tr>
<td>13000</td>
<td>1100</td>
<td>531211</td>
<td>593156</td>
<td>06/03/2016</td>
<td>06/30/2016</td>
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<td>0</td>
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<td>$3,002.00</td>
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<tr>
<td>13000</td>
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<td>531211</td>
<td>701745</td>
<td>12/05/2017</td>
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<td>0</td>
<td>1</td>
<td>$0.00</td>
<td>$50,000.00</td>
<td>Test</td>
</tr>
</tbody>
</table>

Position | IBIS User Notes
---|---
60013650 | Hello! How are you
Entering a Manual Adjustment

A Manual Adjustment can be added during the annual fiscal year-end closeout. Please work with your OSBM Budget Analyst to understand when / if this is needed.

During the fiscal year, under normal nightly processing, manual adjustment transactions are not allowed, as these would just get wiped out by the next night’s interface. During the fiscal year-end close out, there may be a limited ability to do a manual adjustment when the BEACON interface is paused.
### Salary Control

#### IBIS User Guide

**Salary Control - Department of Insurance**

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Description</th>
<th>Budget Code</th>
<th>Fiscal Year</th>
<th>Effective Date</th>
<th>Transaction Date</th>
<th>Position Number</th>
<th>Position FTE</th>
<th>Transaction Type</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>S1211 - SPA-REG SALARIES-APPRO</td>
<td>SPA-REG SALARIES-APPRO</td>
<td>1100 - Administration</td>
<td>2017-2018</td>
<td>06/01/2017</td>
<td>12/31/2017</td>
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<td>0.00</td>
<td>$0.00</td>
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<tr>
<td>0001001</td>
<td>SPA-REG SALARIES-APPRO</td>
<td>1100 - Administration</td>
<td>2017-2018</td>
<td>06/01/2017</td>
<td>12/31/2017</td>
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<td>0.00</td>
<td>$0.00</td>
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</tbody>
</table>

**New Salary Control Adjustment Transaction**

- **Bannium:** 2017-18
- **Fiscal Year:** 2017-2018
- **Budget Code:** 1100 - Administration

<table>
<thead>
<tr>
<th>Account Number</th>
<th>Description</th>
<th>Budget Code</th>
<th>Fiscal Year</th>
<th>Effective Date</th>
<th>Transaction Date</th>
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<th>Position FTE</th>
<th>Transaction Type</th>
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<tr>
<td>0001001</td>
<td>SPA-REG SALARIES-APPRO</td>
<td>1100 - Administration</td>
<td>2017-2018</td>
<td>06/01/2017</td>
<td>12/31/2017</td>
<td>00</td>
<td>0.00</td>
<td>$0.00</td>
<td>NA</td>
</tr>
</tbody>
</table>
Exporting Salary Control data to Excel

To export Salary Control data to Excel for additional analysis, select the ‘Export to Excel’ option. This will run the export and open the file in an Excel (.XLSX format) for your review.
<table>
<thead>
<tr>
<th>Date</th>
<th>BRU</th>
<th>Budget Code</th>
<th>Budget Code Description</th>
<th>Fund Code</th>
<th>Fund Code Description</th>
<th>Account Code</th>
<th>Account Title</th>
<th>IBIS</th>
<th>IBIS User Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/28/16</td>
<td>220</td>
<td>510000</td>
<td>Insurance</td>
<td>511111</td>
<td>SPA-REG SALARIES-APPRO</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8/1/16</td>
<td>220</td>
<td>510000</td>
<td>Insurance</td>
<td>511111</td>
<td>SPA-REG SALARIES-APPRO</td>
<td></td>
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<td></td>
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**Salary Control Transactions**

<table>
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<tr>
<th>Date</th>
<th>BRU</th>
<th>Budget Code</th>
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<td>220</td>
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<td>510000</td>
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<td>511111</td>
<td>SPA-REG SALARIES-APPRO</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
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</table>
General User Notes

The screen dimensions can be changed by clicking and dragging the highlighted portion of the screen below. Adjusting the screen may help when reviewing data.

Additionally, depending on the BRU, there may be multiple pages of data. The screenshot below shows where to scroll the pages if necessary.
The Detailed View pane at the bottom of the screen defaults to an “Auto” setting that displays the information from the last column above that displays information. This can be changed manually by clicking the button for Budget Code, Fund Code, Account or Transaction. The screenshot below shows a manual override to show Fund Code detail rather than the auto default of Transaction ID when all data is displayed.
If an option is selected that is not currently showing data in the top half of the form, the Detailed View will state “No items to show” as shown below.

For convenience, the form also incorporates hover functionality for notes associated with a detailed transaction details since there column’s width is limited. If Transaction ID information is presented in the Detailed View tab, a mouse can be held over a note as shown below and the note will be presented in a new display on the screen.