

Instructions for Using the Position and Wage Calculator (Microsoft Access Version)

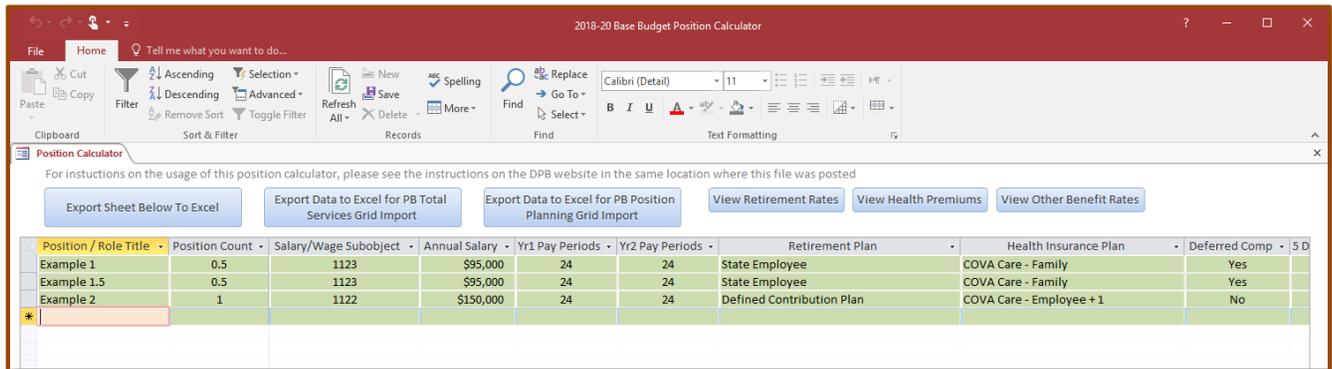


Department of Planning and Budget

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Overview

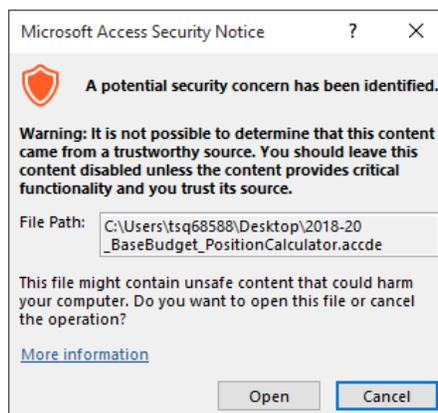
These instructions provide information on the usage of the Position and Wage Calculator tool (Microsoft Access version). This tool is designed to assist you in calculating the cost of both full-time and wage employees. In addition, the tool contains export functionality which will assist you in uploading the resulting data into the Performance Budgeting (PB) system.



The position calculator contains one screen for the entry of data. By way of buttons at the top of the screen, this data can be exported to Excel as it is shown on the screen or formatted to assist you in the upload of the Total Services and Position Planning grids in the Performance Budgeting system. In addition, the benefit rates and other factors assumed in the calculator can be viewed via buttons at the top of the screen.

Obtaining and Opening the Calculator

Download a copy of the position calculator which can be found in the same location where you downloaded these instructions. Locate the position calculator file on your computer (it will have a file extension of ".accde") and double click it to open. When you open the file you may get a security notice like the one below. Click "Open".



Entering (and Deleting) Records

To enter a new record, start typing in the first blank row. This row should show an asterisk (*) in the row margin. To delete a record, select the entire row by clicking on the row margin so that the entire row is highlighted and then press the “Delete” key on your keyboard. Note: the “row margin” is the grey area to the left of the record.

Position / Role Title	Position Count	Salary/Wage Subsubject	Annual Salary	Yr1 Pay Periods	Yr2 Pay Periods	Retirement Plan	Health Insurance Plan	Deferred Comp
Example 1	0.5	1123	\$95,000	24	24	State Employee	COVA Care - Family	Yes
Example 1.5	0.5	1123	\$95,000	24	24	State Employee	COVA Care - Family	Yes
Example 2	1	1122	\$150,000	24	24	Defined Contribution Plan	COVA Care - Employee + 1	No
*								

You should complete all information in the green shaded columns. The un-shaded columns in the middle of the sheet show the calculated costs while the blue shaded columns on the far right of the sheet show the rates and premiums used for each record. The Position/Role Title and Position Count columns will always be visible as you scroll across the sheet.

Position / Role Title	Position Count	Retirement Cost Yr2	Health Cost Yr1	Health Cost Yr2	Total Cost Yr1	Total Cost Yr2	Social Security Rate Yr1	Social Security Rate Yr2	Social Security Cap Yr1
Example 1	0.5	\$6,754	\$8,562	\$8,562	\$68,068	\$68,068	6.20%	6.20%	\$127,200
Example 1.5	0.5	\$6,754	\$8,562	\$8,562	\$68,068	\$68,068	6.20%	6.20%	\$127,200
Example 2	1	\$15,600	\$11,676	\$11,676	\$191,687	\$191,687	6.20%	6.20%	\$127,200
*									

About the Data Entry Columns

As previously mentioned, you should complete the information in the green shaded columns. Those columns and instructions for completing them are as follows:

- Position/Role Title**

Enter the position, role, or whatever title you may want to use for the specific record. If you are entering separate records for each position, you may choose to enter the position title.

- Position Count**

Enter the number of positions the record applies to. You can enter multiple positions on one record if you assume that the annual salary, retirement, health insurance, and other factors are identical. If you need to split a single position across multiple fund details and/or service areas, you should enter a partial position number and use multiple records for that position.

Note on Wage Positions: For the purposes of this calculator, position numbers for wage employees are only used to calculate the dollar cost of wages and benefits (Social Security and Medicare). The position count for wage subobjects will not be included in the authorized position calculations that may be used for uploading into the Performance Budgeting system. Agencies that use subobjects 1142 (Wages, Graduate Assistant) and 1145 (Wages, Teaching, and Research Part-Time) will need to enter these authorized position numbers in the PB system separately but may still use this tool to calculate the dollar cost.

- **Salary/Wage Subobject**

Select the applicable salary or wage subobject from the dropdown list. You should only use subobjects that are applicable to your agency. For example, if you do not employ higher education teaching and research faculty, you should not choose subobject 1126.

- **Annual Salary**

Enter the annual salary for an individual. If you have entered more than one position in the “Position Count” column, you should still only enter the annual salary for an individual. The calculator multiplies the “Position Count” by the Annual Salary to make the associated cost calculations. For wage positions, enter the wages you would pay an individual in a year in the “Annual Salary” column.

- **Yr1/Yr2 Pay Periods**

Enter the number of pay periods the position or positions will be effective for in the first and second year. The number of pay periods can be between 1 and 24. For base budget calculations, the default of 24 pay periods should be entered.

- **Retirement Plan**

Select the applicable retirement plan for the positions in the record. For wage positions, you should choose “Not Applicable”. Note: Regardless of the retirement plan choice, no retirement costs will be calculated for wage employees.

- **Health Insurance Plan**

Select the applicable health plan for the positions in the record. For wage positions, you should choose “Not Applicable”. Note: Regardless of the health plan choice, no health insurance costs will be calculated for wage employees.

- **Deferred Comp**

Select “Yes” or “No” to indicate the participation level in the Deferred Compensation program. If “Yes” is selected, the calculator assumes the maximum \$20 per pay period state match (max \$480 per year).

- **5 Digit Service Area**

Enter the five-digit service area you would use to enter budget amounts in the Performance Budgeting system. If you plan to load exported data into the PB system later, this Service Area entry must be correct or the import in PB will not succeed. This column is optional if you have no plans to import data into PB.

- **5 Digit Fund**

Enter the five-digit fund detail you would use to enter budget amounts in the Performance Budgeting system. If you plan to load exported data into the PB system later, this Fund entry must be correct or the import in PB will not succeed. This column is optional if you have no plans to import data into PB.

About Cost Calculations

Cost calculations are based on the selections and entries you may in the previously described data entry columns. Methodologies for cost calculations are summarized as follows:

- **Salary/Wage Cost**

The cost of salary and wages in each year is calculated as follows;

Annual Salary (\$) * ([Pay Periods]/24) * Position Count

- **Benefit Costs Expressed as a Percent of Salary**

This includes all retirement plans and all other benefits whose rates are expressed as a percentage. The cost for these benefits is derived as follows;

Annual Salary (\$) * Benefit Rate (%) * (Pay Periods/24) * Position Count

Note: Social Security calculations use the lesser of the Annual Salary or the Social Security cap to determine costs.

- **Benefit Costs Expressed as a Dollar Amount (Health Insurance)**

The cost for health insurance premiums is derived as follows;

Health Premium (\$) * (Pay Periods/24) * Position Count

- **Deferred Compensation Match**

The cost for Deferred Comp Match is derived as follows;

If Deferred Comp="Yes" THEN: \$20*Pay Periods * Position Count

If Deferred Comp="No" THEN: \$0

- **Other Considerations**

1. For wage positions, only salary/Wage, Social Security and Medicare benefit costs are calculated regardless of the choices made in the "Retirement Plan" and "Health Plan" columns.
2. All salary/wage and benefits cost calculations are rounded to the nearest dollar.

Exporting Data to Excel

You can use the three large buttons at the top of the screen to export data to Excel:



Use the "Export Sheet Below To Excel" button to export the contents of the entry screen to an Excel Spreadsheet.

The other two buttons can be used to export service area, fund detail, and subobject data to Excel for dollars and positions that can be eventually imported into the Performance Budgeting system. See the "Importing Data in the Performance Budgeting System" section of these instructions for more information.

For each of these options, the Excel spreadsheet will automatically open after it is exported.

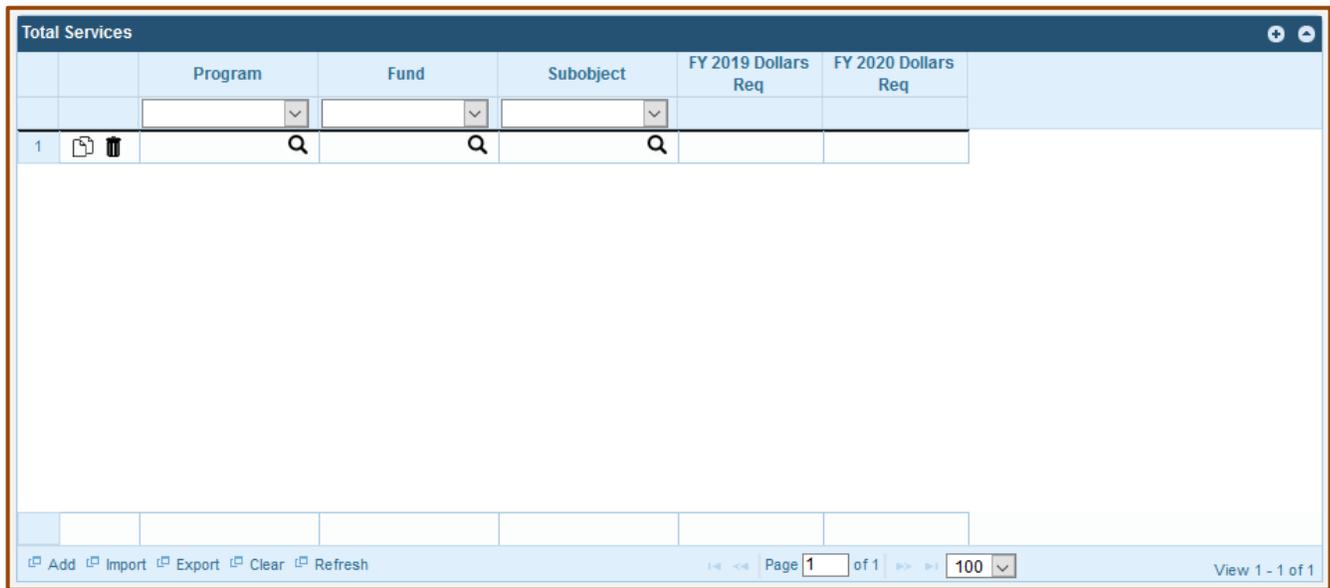
Importing Data in the Performance Budgeting System

The importing of Position Calculator data into the Performance Budgeting system takes a few steps. The steps for doing this for both the Total Services grid (dollars) and Position Planning grid (authorized positions) are outlined below.

Total Services Grid Import

Total Services Grid Step 1, Exporting the Total Services grid template

From within an operating budget development module in the PB system (e.g. base budget, decision package), find the Total Services grid. Make sure the grid is empty.



Total Services						
	Program	Fund	Subobject	FY 2019 Dollars Req	FY 2020 Dollars Req	
1						

At the bottom of the grid, there are links: Add, Import, Export, Clear, Refresh. Page 1 of 1, 100, View 1 - 1 of 1.

At the bottom of the Total Services grid, you should see links labeled “Add”, “Import”, “Export”, “Clear” and “Refresh”. Click the “Export” link. This will prompt you to save an Excel (.xls) file containing an empty template for the Total Services grid. Make sure to note where the template was saved and the file name.

Total Services Grid Step 2, Exporting Position Calculator Total Services Data

From within the Position Calculator tool, click the “Export Data to Excel for PB Total Services Grid Import” button. This will prompt you to save an Excel file (.xlsx) containing data from the Position and Wage calculator formatted for copying into the PB Total Services grid template. Make note of where this file is saved.



Total Services Grid Step 3, Copy Exported Position Calculator Data into the PB Template

Open the blank PB System Total Services grid template downloaded in step 1 and the exported Position Calculator data saved in Step 2 above. Copy the data only (not the column headers) from the Position Calculator Excel data and paste it under the corresponding column headers in the blank PB system template. Save the PB Total Services grid template file. Note: It is recommended that you use the “Paste Special – Values” method of pasting this data.

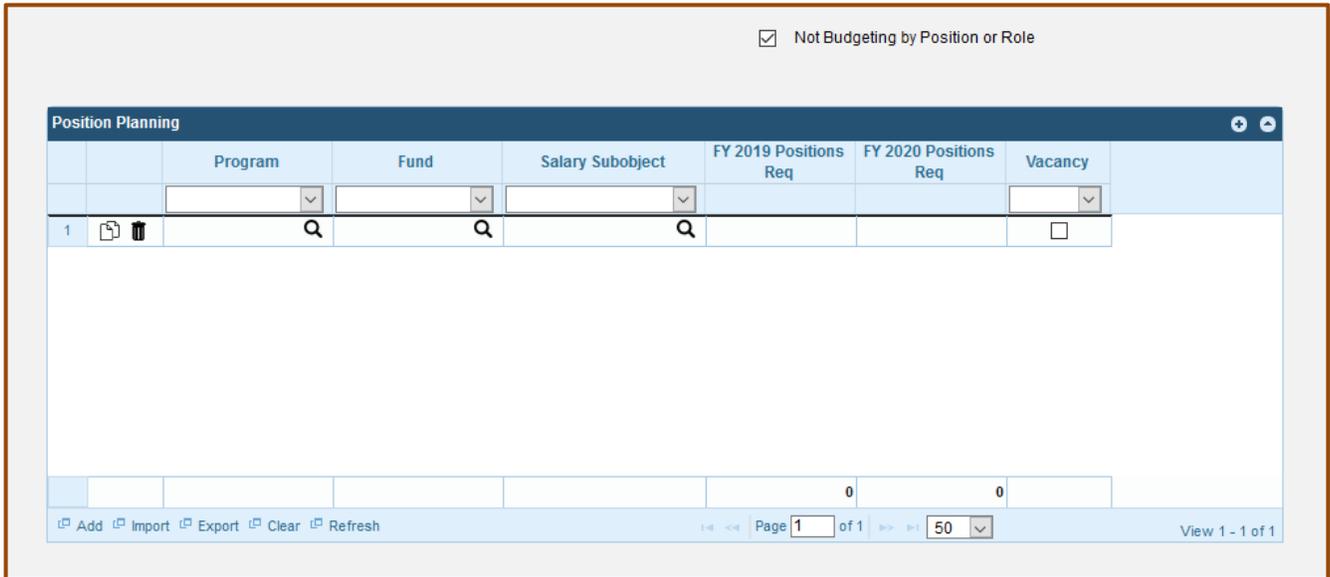
Total Services Grid Step 4, Import the data into the PB system

From within an operating budget development module in the PB system (e.g. base budget, decision package), find the Total Services grid. Click the “Import” link at the bottom of the grid. This will prompt you for an Excel (.xls) file to import. Navigate to and select the now populated PB template saved in Step 3 above. This should result in the population of the total services grid with data from the Position Calculator.

Position Planning Grid Import

Position Planning Grid Step 1, Exporting the Total Services grid template

From within an operating budget development module in the PB system (e.g. base budget, decision package), find the Position Planning tab and the Position Planning grid. Make sure the grid is empty.



Above the Position Planning grid, check the box next to “Not Budgeting by Role or Position”. At the bottom of the Position Planning grid, you should see links labeled “Add”, “Import”, “Export”, “Clear” and “Refresh”. Click the “Export” link. This will prompt you to save an Excel (.xls) file containing an empty template for the Position Planning grid. Make sure to note where the template was saved and the file name.

Position Planning Grid Step 2, Exporting Position Calculator Position Planning Data

From within the Position Calculator tool, click the “Export Data to Excel for PB Position Planning Grid Import” button. This will prompt you to save an Excel file (.xlsx) containing data from the Position and Wage calculator formatted for copying into the PB Total Services grid template. Make note of where this file is saved.



Position Planning Grid Step 3, Copy Exported Position Calculator Data into the PB Template

Open the blank PB System Position Planning grid template downloaded in step 1 and the exported Position Calculator data saved in Step 2 above. Copy the data only (not the column headers) from the Position Calculator Excel data and paste it under the corresponding column headers in the blank PB system template. Save the PB Position Planning grid template file. Note: It is recommended that you use the “Paste Special – Values” method of pasting this data.

Position Planning Grid Step 4, Import the data into the PB system

From within an operating budget development module in the PB system (e.g. base budget, decision package), find the Position Planning grid. Click the “Import” link at the bottom of the grid. This will prompt you for an Excel (.xls) file to import. Navigate to and select the now populated PB template saved in Step 3 above. This should result in the population of the position planning grid with data from the Position Calculator.