# Instructions for Using the Statewide Human Resources Data Management System

## (aka CIMAI--Compensation Impact Model-Agency Interface)

## High Level Summary of the Process

For the purpose of collecting compensation data for the 2017-19 Biennial Budget development cycle, institutions of higher education are submitting data to the Compensation Impact Model-Agency Interface (CIMAI), and using an interface to check the data and fill in vacancies where positions were vacant when the data was submitted to OFM. This should be a simple process with just a few steps, outlined below. Each step is detailed on the following pages.

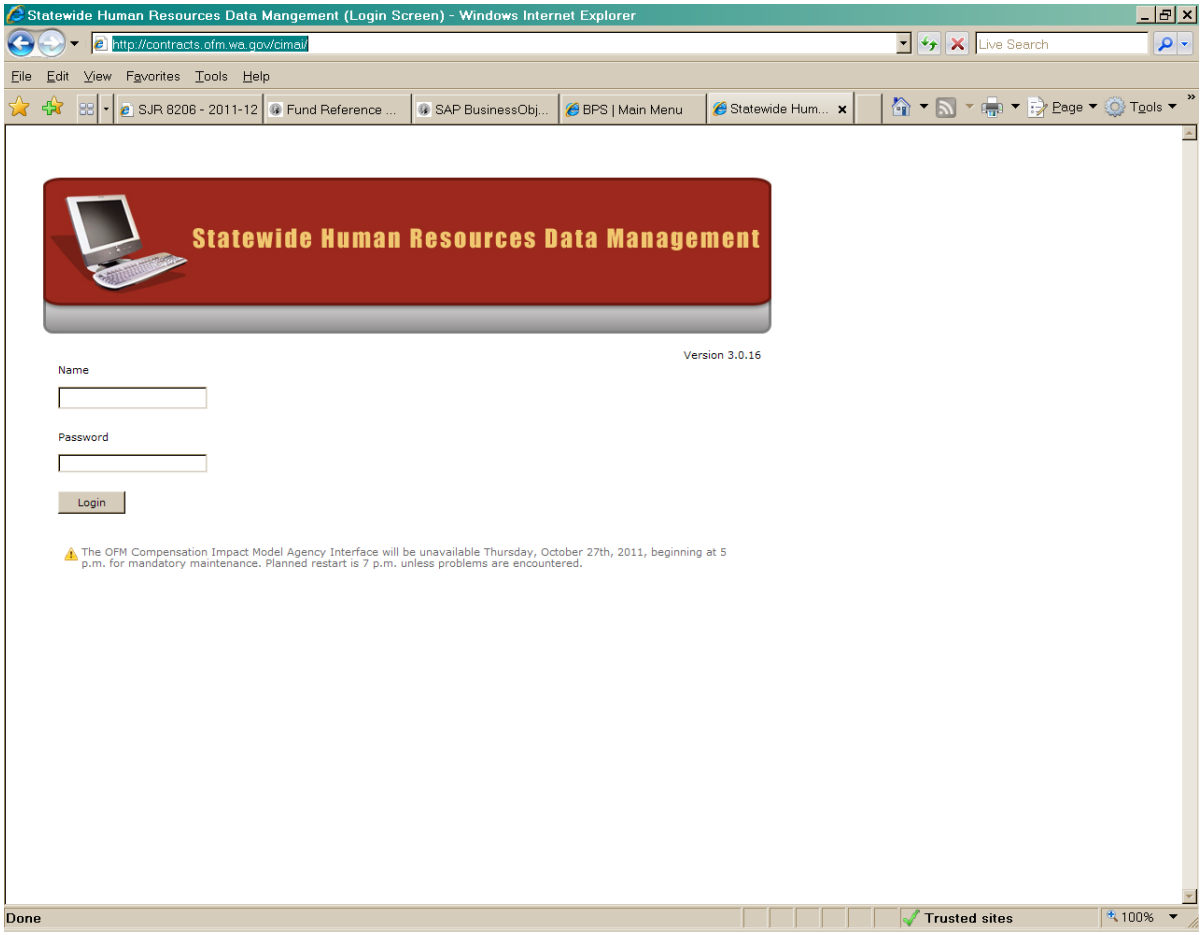
1. If you don't have your user id and/or password for the CIMAI application, contact the WaTech Solutions Center. Email: solutionscenter@WaTech.wa.gov; Phone: (360) 407-9100.
2. Logon to the system: Here is the link to the fortress entrance for CIMAI: https://fortress.wa.gov/ofm/cimai/
3. Choose the payroll submittal you want to use (see pages 4 through 6 for instructions). You have the option to load just part of your data. See page 5 for detail on this option.
4. Once your data is loaded, your next step is to check the extract to see if there are existing records that need corrected.
5. If there are records with errors, click the Edit Record button to the right of the item to correct the error identified on the error screen.
6. Once errors are corrected, move to the Extract screen, and run the B6-Salary, B6-Pension, and B6-Insurance extracts (at the bottom of the list) to determine how your data compares to where you should be for your 2017-19 Maintenance Level. **This determination should be based on budgeted FTEs--especially FTEs charged to GF-S (001-1). OFM will compare your final 001 FTE and salary level to your FY 2013 actuals, and will compare the total operating budgeted FTEs to your operating 2017-19 Maintenance Level as a reasonability check.** There are also a number of other extracts you can run, such as Staff Union/Bargaining Unit Listing that will help you see if you have the correct number of represented vs. non-represented staff. And, you can run your own B6 Reports that separate staff into groups, including faculty, exempt, represented, etc.
7. From the main menu, go to the Add Vacant screen to add your missing types of positions (for example, you are missing 27 faculty members, but you add one "average" faculty, then replicate it elsewhere).
8. Once you've added the individual vacant positions you need, go to the main menu, then to Find/Edit Employee Records to replicate the added vacant positions.
9. Once you are finished replicating your missing positions, rerun your B6, B6-P, and B6-I extracts to recheck your bottom line.
10. If you are too high or too low, you can repeat steps 7, 8, and 9 above. If adding whole positions is not the answer, you can adjust individual positions to change pension systems, the health insurance flag, or salary fund splits. Use the Find/Edit Employee Records to adjust individual records.

**Now each instruction will be repeated, with screen prints and more detail for the various steps.**

**Step 1:** If you don't have your user id and/or password for the CIMAI application, contact the WaTech Solutions Center.
Email: solutionscenter@WaTech.wa.gov
Phone: (360) 407-9100

## Step 2: Logon to the System

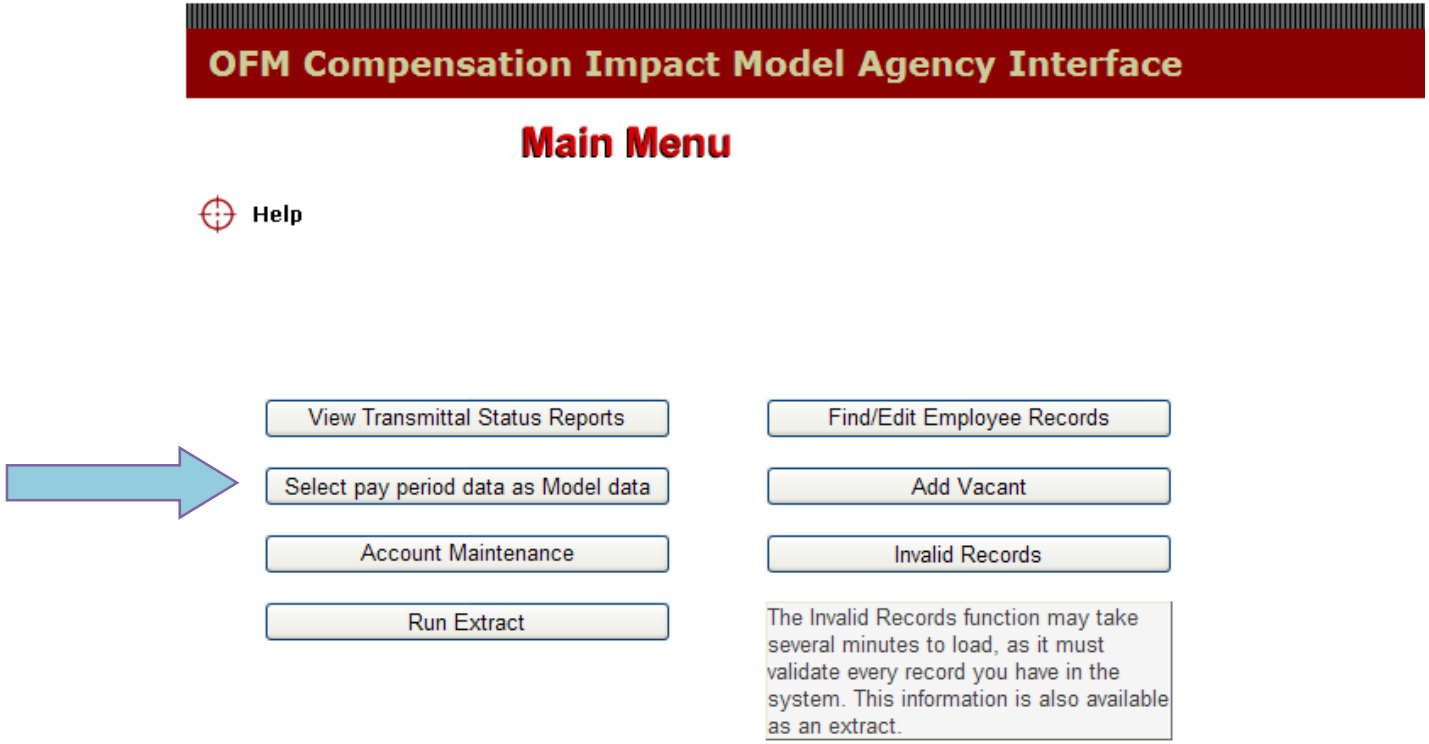
Here is the link to the fortress entrance for CIMAI: https://fortress.wa.gov/ofm/cimai/. The login screen looks like this: Log-on to the system. You should no longer have to use "compatibility mode" for CIMAI.



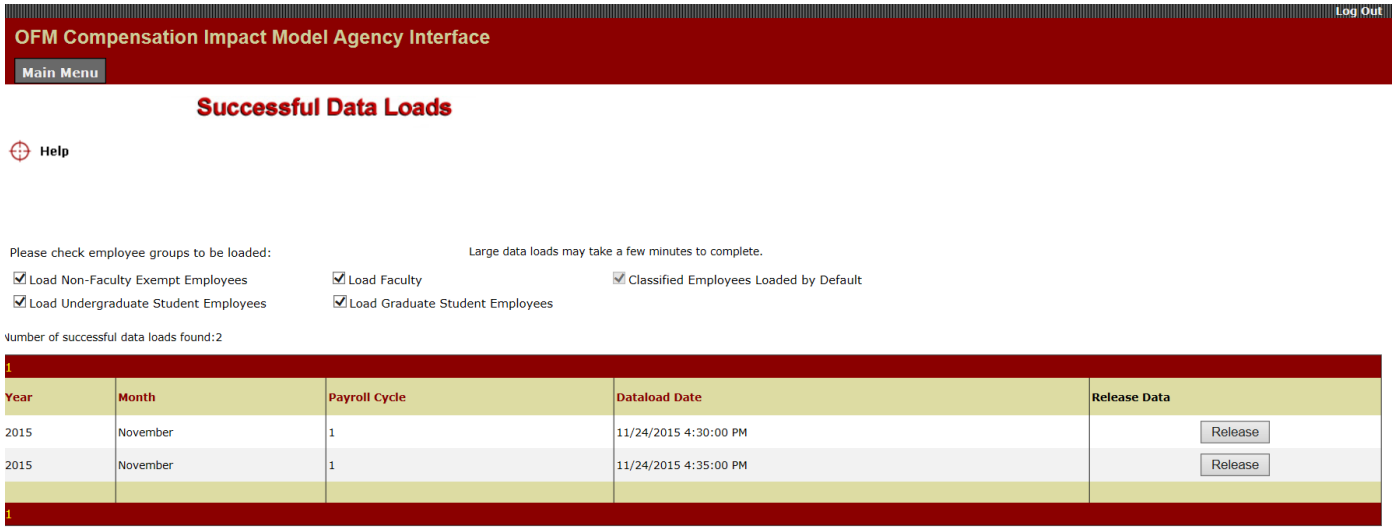
## Step 3. Load data from OFM's Statewide HR database to CIMAI

NOTE: Not all individuals have authority to load data and, therefore, access to this button. The State Board will load the data for all Community and Technical Colleges. Agencies should notify Pam Davidson as to who at their agency should have that access. If you are not responsible for loading data, you can skip this section.

Click on the "Select pay period data as Model data" button.



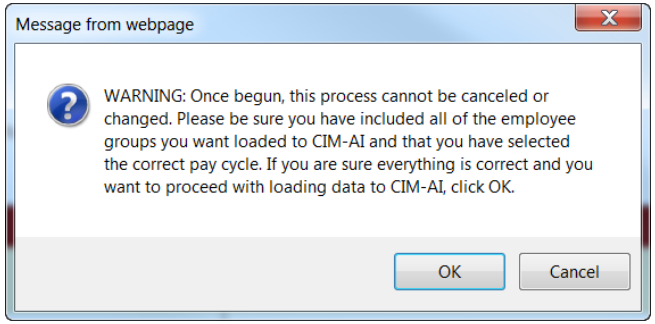
1. Uncheck those employee groups that you do NOT want loaded. All groups are now checked by default.



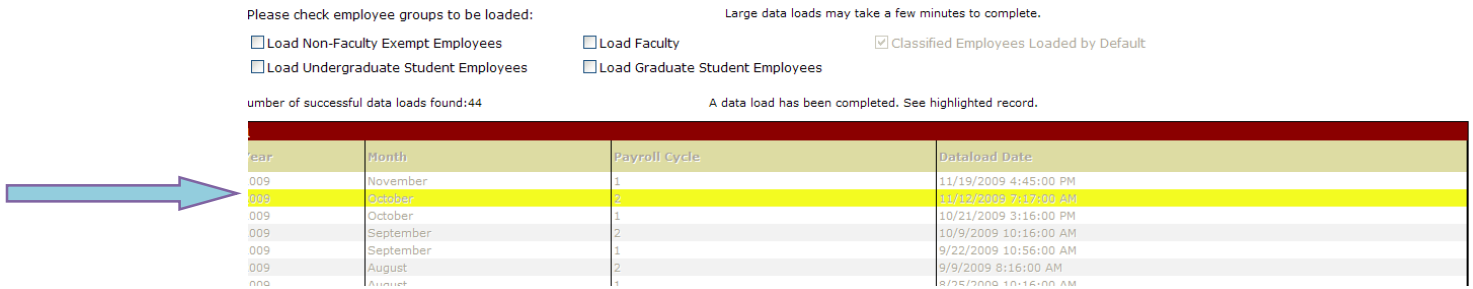

2. Select the Pay Period of data you want to load by clicking the appropriate Release button. Clicking on column heading "Data load Date" **twice** will sort the data load in descending order (most recent first).

   NOTE: You only have the option to load pay periods subsequent to your institution implementing the May 2015 Change Order to the SWHR Data Transmittal Specification. If your institution has not yet implemented the change order, you will have to wait until your implementation is complete.

3. The data load can only be performed once, so you will get this opportunity to accept your selections, or cancel and reset your selections.




4. Click Ok when you're ready to proceed. The data load may take up to three or four minutes for large data sets.

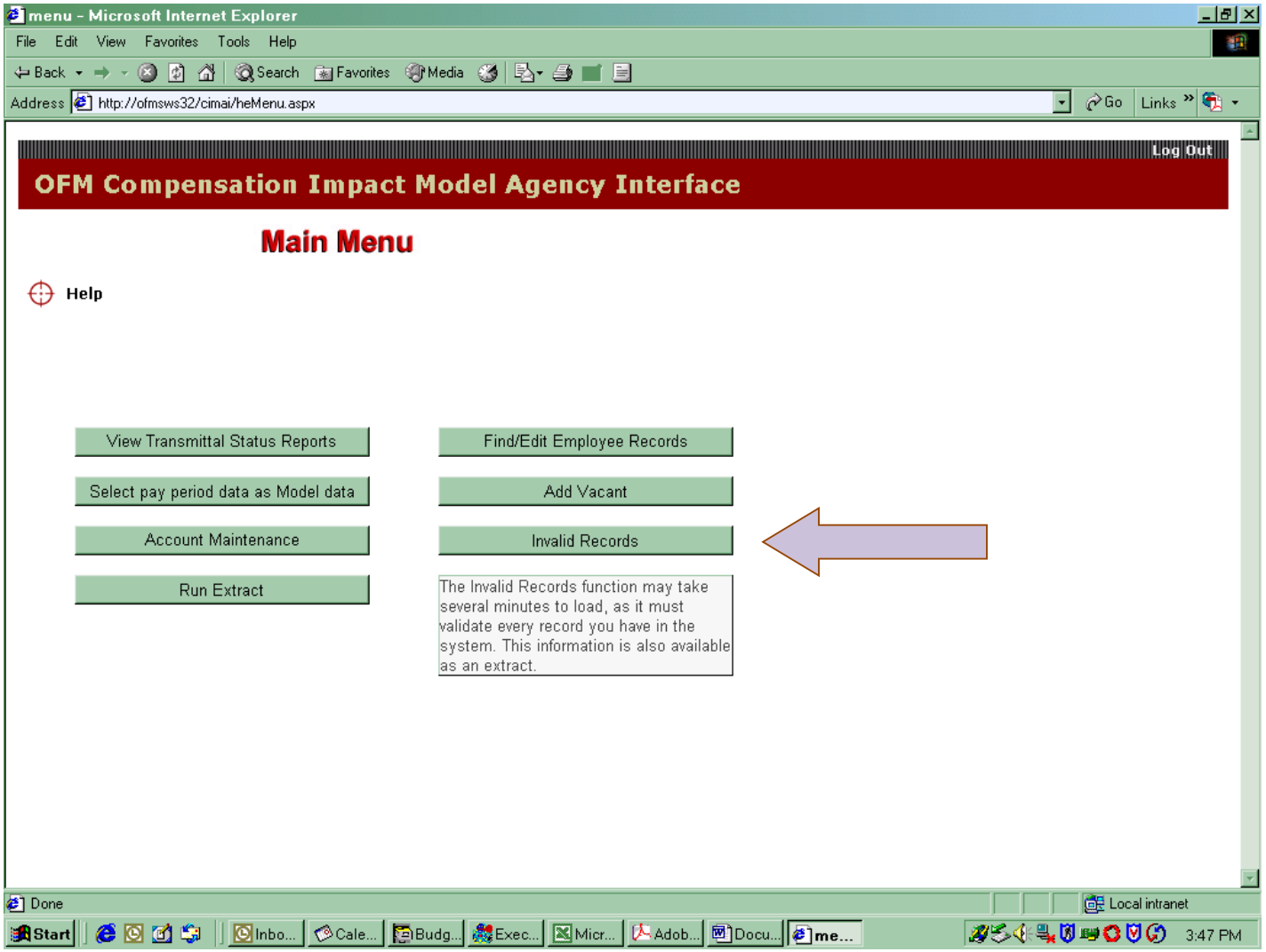



5. The pay period you have selected will be highlighted when the data load is complete. You should also get an email notification.

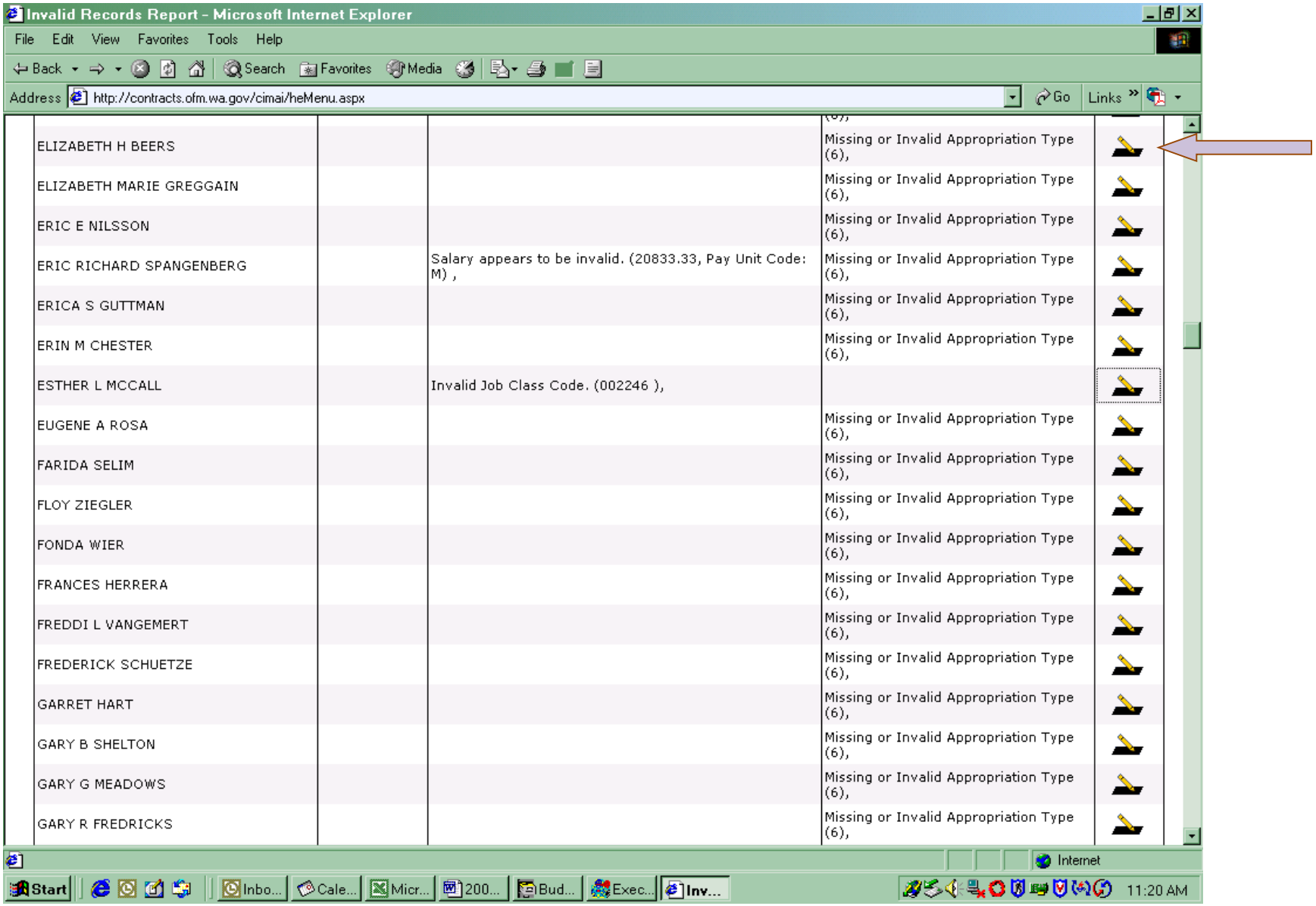
6. Once the data is loaded, you can begin working with the data immediately.

## Step 4. Check for Invalid Records

After the data is loaded, check the Invalid Records (button on bottom, right) extract to see if there are records that need corrected.




If there are invalid records, the list will look like this. To edit a record, click on the pencil icon on the right.




## Step 5. Correct Invalid Records

This will take you to the Search screen, where you will click on the Edit Compensation pencil icon.

Search & Edit People/Positions - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Media

Address http://contracts.ofm.wa.gov/cimai/errReport.aspx Go Links

Log Out

**OFM Compensation Impact Model Agency Interface**

Main Menu | Add Vacant | Search Person/Position | Compensation | Funding | Invalid Records

Search Person/Position

**Step 1**

Help

Search Criteria

Name

Position #

Job Class

Job Class Title

Bargaining Unit

Include Vacant Positions

and/or

Include Filled Positions

Search | Clear All | Max Num of Recs: 250

Results: Edit/Select the person/position from below

Number of records found:1

Page 1

| Name | Anniversary Date | Edit Person | Edit Compensation | Delete |
|---|---|---|---|---|
| ESTHER L MCCALL | 10/15/97 | Edit | | Delete |

Page 1

Done Internet

Start Inbox - ... Calend... Micros... 2006 Cl... Budget ... Executi... Searc... 11:23 AM

This will take you to the Compensation screen, where you will click on the Edit Compensation pencil icon.

Edit Compensation for this Person/Position - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://contracts.ofm.wa.gov/cimai/search.aspx

Log Out

# OFM Compensation Impact Model Agency Interface

Main Menu | Add Vacant | Search Person/Position | Compensation | Funding | Invalid Records

Compensation

**Step 2**

Help

**Compensation for: ESTHER L MCCALL (365-Washington State University)**

Compensation: Select the compensation record from below to edit.

| Position # | Job Class / Working Title | Salary Unit | Salary Amount | Edit Compensation | Edit Funding |
|---|---|---|---|---|---|
| 0388380903450 | Secretary Ld / Secretary Ld | MONTHLY | $2,864.00 | | |
| | | | | | |

In this case, the error is a missing Job Class. Use the drop down box, scroll to the correct job class, select it, then hit Save Change for this Record on bottom, right.

Edit the selected compensation record - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Search Favorites Media

Address http://contracts.ofm.wa.gov/cimai/comp.aspx Go Links

Log Out

OFM Compensation Impact Model Agency Interface

Main Menu | Add Vacant | Search Person/Position | Compensation | Funding | Invalid Records

Compensation

Step 2

Help

Compensation for: ESTHER L MCCALL (365-Washington State University)

Classified by RCW: Subject to the civil service provisions of RCW chapter 41.06 (Classified)

Bargaining Unit: 04-Non-Represented 4 Year Higher Education

Position Start Date: 01/20/2006

Number of Months: 12

Job Class:

Student Job: Not a Student

Working: Secretary Ld

Salary Range:

Salary Step:

Periodic Increment Date: 04/01/2002

Salary Unit Code: MONTHLY

Work County: WHITMAN

Work Period Percent: 100

Retirement: P2-Public Employees Retirement System (PERS)--Plan

Salary Unit Amount: 2864

EEO: Clerical / Secretarial

Look up the salary amount

Eligible for Insurance

Position Backfill Flag

The calculated monthly salary amount for budgeting purposes is $2864

FTEs for this position: 1

Save Changes for this record

Return to Compensation List

Done

Internet

Start | Inbox - ... | Calend... | Micros... | 2006 Cl... | Budget ... | Executi... | Edit t... | 11:25 AM

Another possible error is with the funding record. If so, click the Edit Record button to the right of the item to correct the error.

Invalid Records Report - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://ofmsws32/cimai/heMenu.aspx

Log Out

**OFM Compensation Impact Model Agency Interface**

Main Menu | Add Vacant | Search Person/Position | Compensation | Funding | Invalid Records

**Invalid Records**

Help

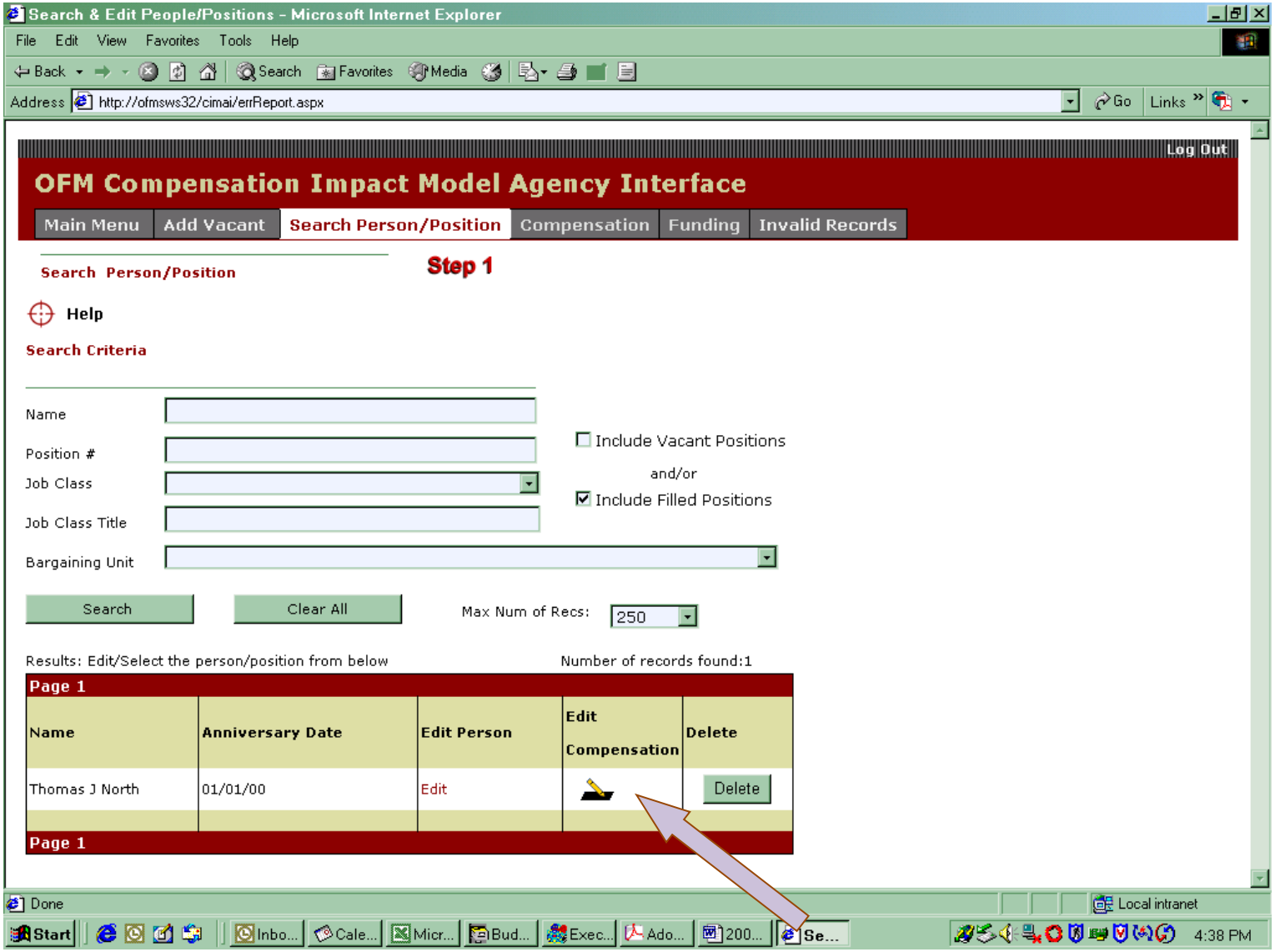
Select a record below to edit. Number of records found:1

Page 1

| Name | Person Issues | Compensation Issues | Funding Issues | Edit Record |
|---|---|---|---|---|
| Thomas J North | | | Invalid Funding - Total of funds not = 100% (100.10%), | |

Page 1

You will first be taken to this screen. You will click on Edit Compensation.




You will then be taken to the Compensation screen. If the error relates to funding, click on the Edit Funding pencil icon.

Edit Compensation for this Person/Position - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://ofmsws32/cimai/search.aspx

Log Out

**OFM Compensation Impact Model Agency Interface**

Main Menu | Add Vacant | Search Person/Position | Compensation | Funding | Invalid Records

Compensation

**Step 2**

Help

**Compensation for: Thomas J North (375-Central Washington University)**

Compensation: Select the compensation record from below to edit.

| Position # | Job Class / Working Title | Salary Unit | Salary Amount | Edit Compensation | Edit Funding |
|---|---|---|---|---|---|
| ADM0022050908 | Asst Dir for At / Asst Dir for At | MONTHLY | $4,343.08 | | |

Done

Local intranet

Start | Inbo... | Cale... | Micr... | Bud... | Exec... | Ado... | 200... | Edi... | 4:38 PM

As can be seen in the example below, the error is caused by funding not equaling 100 percent. Click on Select/Edit and correct the prorated percent, then click on Save Changes.

Edit Funding for this Person/Position - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://ofmsws32/cimai/comp.aspx

Log Out

OFM Compensation Impact Model Agency Interface

Main Menu | Add Vacant | Search Person/Position | Compensation | Funding | Invalid Records

Funding

Step 3

Help

Funding for: Thomas J North (375-Central Washington University)

Working title: Asst Dir for At / Job Title: Asst Dir for Ath/BusAffairs

Fund: Approp Type:

Prorated Percent:

Insert New Funding Record | Save Changes | Cancel / Refresh Page

Funding is at 100.1% for this position. It must be 100%.

Funding: Select the funding record from below to edit.

| Fund | Approp Type | Prorated Percent | Select/Edit | Delete |
|---|---|---|---|---|
| 148-Inst of Hi Ed-Dedicated Local Acct | 6-Non Appr | 14.5 | | |
| 001-General Fund | 1-State | 85.6 | | Delete |

Done | Local intranet

Start | Inbo... | Cale... | Micr... | Bud... | Exec... | Ado... | 200... | Edi... | 4:39 PM

## Step 6: Use extracts/reports to determine your FTEs, Salary Base, Pension Base and Insurance Head Counts

Once errors are corrected, move to the Extract screen, and run the B6 reports. OFM recommends using the new B6 reports. The older *B6-Salary, B6-Pension*, and *B6-Insurance* extracts may also be helpful. All of the B6 reports are at the bottom of the list. Use them to determine how your data compares to where you should be for your Next Biennium Maintenance Level. You can also run the other extracts for varying detail of your data. For example, you might want to run the *Staff union/bargaining unit report* to ensure that your split of represented to non-represented staff is correct.

Log Out

**OFM Compensation Impact Model Agency Interface**

Main Menu

**Extracts**

Help

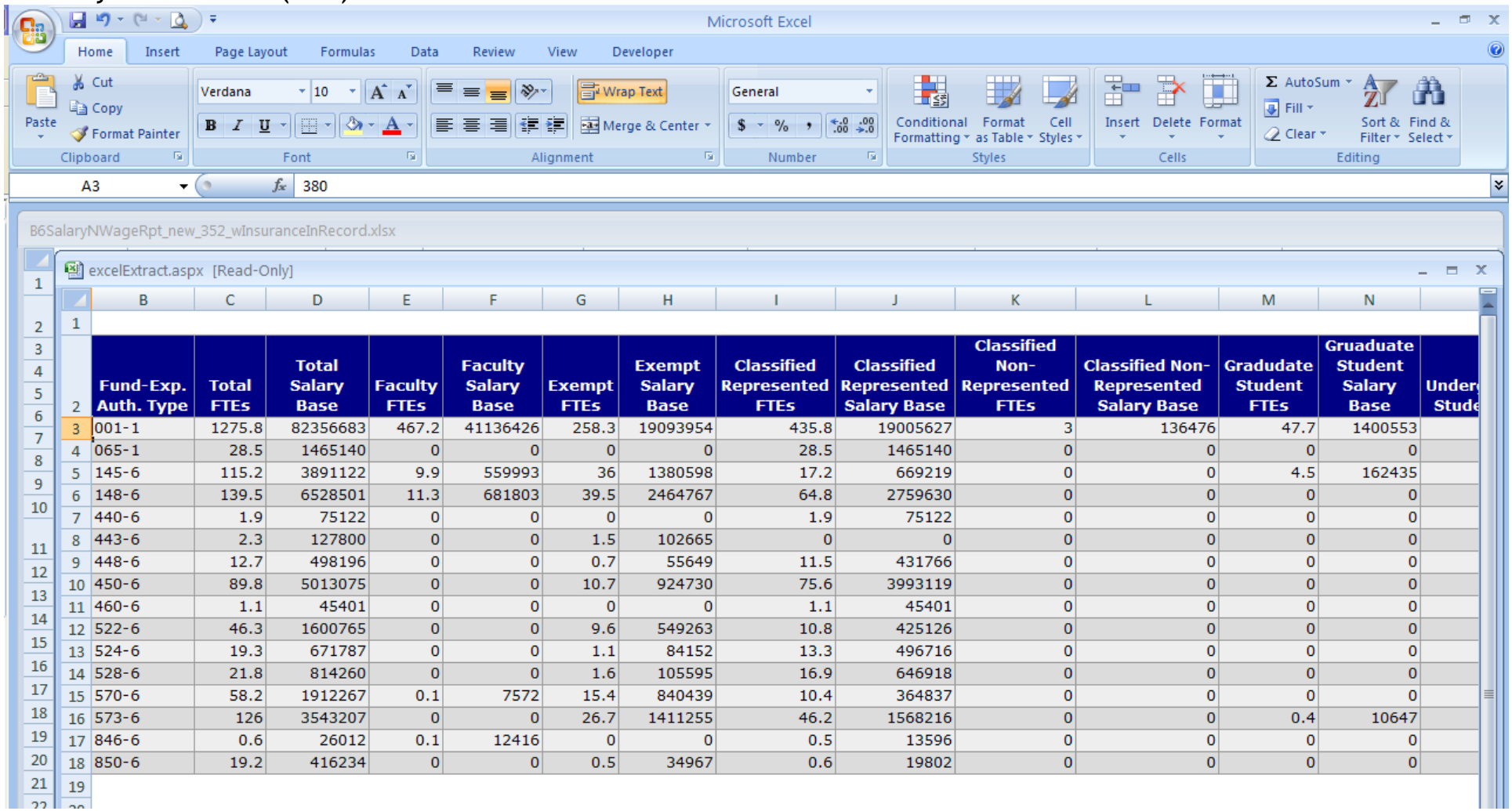
| Title | Description | Open in Excel |
|---|---|---|
| Agency Activity Extract (30 days.) | This extract is for internal system users only. It shows the number of updates done by all the agencies, and who they were done by, for the last 30 days. | Open |
| Extract of CIMAI errors | Administrator only extract. Shows all errors stored in the database by the Overlay application. Ordered by date descending. | Open |
| Invalid records listing | A listing of invalid records for your agency. This extract contains the exact same information found on the Invalid Records screen. | Open |
| Staff detail listing | A listing of the staff for your agency, including person, compensation and funding detail. | Open |
| Staff union/bargaining unit listing | A listing of the staff for your agency and union/bargaining unit membership. | Open |
| Version Compare (Pre Model) | A report that compares two model versions (data prior to placement in model tables). For 07-09 compare versions 1 and 2. | Open |
| Agency Budget By Fund and Appropriations Type. | Included are the Estimated Biennial Budget, Average Annual Salary, and the FTE's. These are grouped by fund and appropriations type. | Open |
| Agency Budget Estimate | A calculated biennial estimate of the salary cost of all employees for an agency. This is a tool to help determine whether your data is close to your budgeted Maintenance Level. Excludes hiring phased in beyond 7/1/05. | Open |
| Back Fill Staff | A report showing the staff designated as back fill. | Open |
| Benefits Extract | Provides Benefits information for an agency. (Person ID, Position Number, Name, Payroll Subagency, Appointment Category ,Job Class, Working Title, Bargaining Unit, Insurance Eligibility, Position Backfill Flag, I-732 Flag, Medical Aid, Retirement System) | Open |
| Funding Extract | Person ID, Position Number, Name, Job Class, Working Title, Salary Unit, Salary Unit Amt, Salary Range, Salary Step, Salary Payment Months, Fund, Appropriation Type, Work Period Percent, Funding Proration, program, Student Job, EEO | Open |
| Payroll Extract | This Extract provides payroll information for an agency. (Person ID, Position Number, Name, Job Class, Working Title, Salary Unit, Salary Unit Amount, Salary Range, Salary Step, Periodic Increment Date, % of Time Worked, EEO, Student ) | Open |
| Staff identified as I-732 | Employees by agency who have the I-732 flag set to "Y" | Open |
| Your agency bargaining units | A list of the valid bargaining units for your agency. | Open |
| B6 Insurance Head Count Details | Provides Insurance Eligibility counts for Represented and Non-Represented employees for a single agency. | Open |
| B6 Insurance Head Count Details (CTC) - State Board Only | Provides Insurance Eligibility counts for Represented and Non-Represented employees for Community and Technical Colleges and the State Board for CTCs | Open |

| | | |
|---|---|---|
| B6 Insurance Head Count Details | Provides Insurance Eligibility counts for Represented and Non-Represented employees for a single agency. | Open |
| B6 Insurance Head Count Details (CTC) - State Board Only | Provides Insurance Eligibility counts for Represented and Non-Represented employees for Community and Technical Colleges and the State Board for CTCs. | Open |
| B6 Insurance Head Counts by Account (CTC) - State Board Only (New) | Provides Insurance Eligibility counts by B6 Group and Account (Fund and Appropriation Type) for all community and technical colleges and the State Board for CTCs. | Open |
| B6 Insurance Head Counts by Account (New) | Provides Insurance Eligibility counts by B6 Group and Account (Fund and Appropriation Type) for individual agencies. | Open |
| B6 Pension Base Details (CTC) - State Board Only (New) | FTEs and Annual Pension Base by Retirement System, Account (Fund and Expenditure Authority Type) and B6 Group (includes all community and technical colleges and the State Board for CTCs) | Open |
| B6 Pension Base Details (New) | FTEs and Annual Pension Base by Retirement System, Account (Fund and Expenditure Authority Type) and B6 Group | Open |
| B6 Pension Contribution Base Details | Provides annual pension base and FTE counts by Retirement System, Fund, and Appropriation Type. | Open |
| B6 Pension Contribution Base Details (CTC) - State Board Only | Provides annual pension base and FTE counts by Retirement System, Fund, and Appropriation Type for Community and Technical Colleges and the State Board for CTCs. | Open |
| B6 Salary & FTE Details (CTC) - State Board Only (New) | FTEs and Annual Salary Base by Account and B6 Group (includes all community and technical colleges and the State Board for CTCs) | Open |
| B6 Salary & FTE Details (New) | Summarizes Annual Salary Base and FTEs by Account and B6 Group | Open |
| B6 Salary and Wage Details | Summarizes Annual Salary Base and FTEs for Represented and Non-Represented employees by Appointment Category, Fund, and Appropriation Type. | Open |
| B6 Salary and Wage Details (CTC) - State Board Only | Summarizes Annual Salary Base and FTEs for Represented and Non-Represented employees by Appointment Category, Fund, and Appropriation Type for Community and Technical Colleges and the State Board for CTCs. | Open |

The extracts run in Excel, and can be saved as Excel files, so you can sort, print, or send to others for review. If you have MS Office 2007, it is best to open the Extract and then Save As an Excel file (.xlsx). If Excel is already open, you may have to click on a current Excel document in order to activate the file download. In addition, a newly selected extract will not open if you haven't saved (with alternate file name) or closed the previous extract.

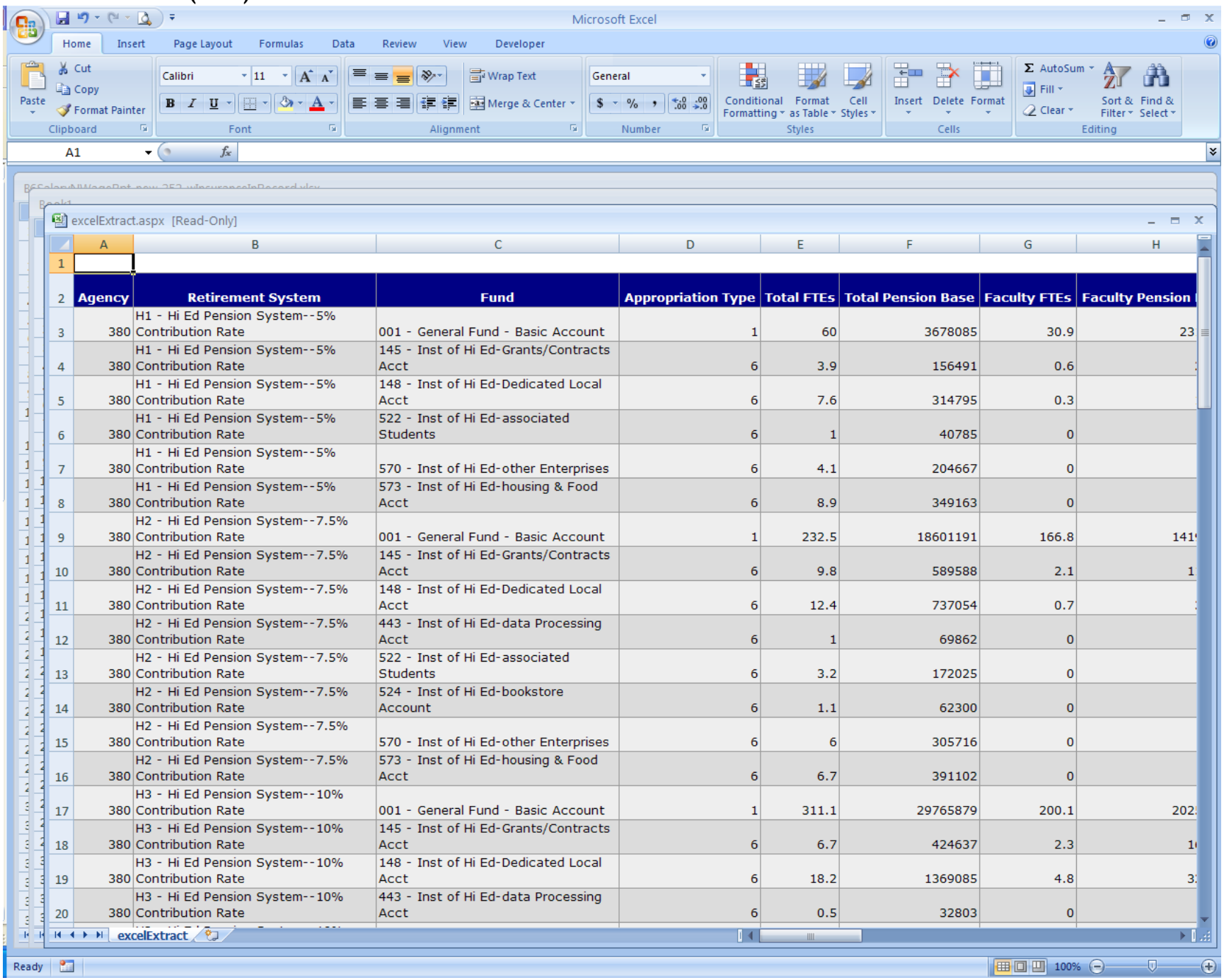
Some columns vary depending upon the agency. For example, only 4-year institutions have Graduate Student employees. Generally the columns will be as wide as the column title. These were narrowed manually to fit more columns in the view.

## B6 Salary & FTE Details (New)




| Fund-Exp. Auth. Type | Total FTEs | Total Salary Base | Faculty FTEs | Faculty Salary Base | Exempt FTEs | Exempt Salary Base | Classified Represented FTEs | Classified Represented Salary Base | Classified Non-Represented FTEs | Classified Non-Represented Salary Base | Gradudate Student FTEs | Gruaduate Student Salary Base | Under Stude |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 001-1 | 1275.8 | 82356683 | 467.2 | 41136426 | 258.3 | 19093954 | 435.8 | 19005627 | 3 | 136476 | 47.7 | 1400553 | |
| 065-1 | 28.5 | 1465140 | 0 | 0 | 0 | 0 | 28.5 | 1465140 | 0 | 0 | 0 | 0 | |
| 145-6 | 115.2 | 3891122 | 9.9 | 559993 | 36 | 1380598 | 17.2 | 669219 | 0 | 0 | 4.5 | 162435 | |
| 148-6 | 139.5 | 6528501 | 11.3 | 681803 | 39.5 | 2464767 | 64.8 | 2759630 | 0 | 0 | 0 | 0 | |
| 440-6 | 1.9 | 75122 | 0 | 0 | 0 | 0 | 1.9 | 75122 | 0 | 0 | 0 | 0 | |
| 443-6 | 2.3 | 127800 | 0 | 0 | 1.5 | 102665 | 0 | 0 | 0 | 0 | 0 | 0 | |
| 448-6 | 12.7 | 498196 | 0 | 0 | 0.7 | 55649 | 11.5 | 431766 | 0 | 0 | 0 | 0 | |
| 450-6 | 89.8 | 5013075 | 0 | 0 | 10.7 | 924730 | 75.6 | 3993119 | 0 | 0 | 0 | 0 | |
| 460-6 | 1.1 | 45401 | 0 | 0 | 0 | 0 | 1.1 | 45401 | 0 | 0 | 0 | 0 | |
| 522-6 | 46.3 | 1600765 | 0 | 0 | 9.6 | 549263 | 10.8 | 425126 | 0 | 0 | 0 | 0 | |
| 524-6 | 19.3 | 671787 | 0 | 0 | 1.1 | 84152 | 13.3 | 496716 | 0 | 0 | 0 | 0 | |
| 528-6 | 21.8 | 814260 | 0 | 0 | 1.6 | 105595 | 16.9 | 646918 | 0 | 0 | 0 | 0 | |
| 570-6 | 58.2 | 1912267 | 0.1 | 7572 | 15.4 | 840439 | 10.4 | 364837 | 0 | 0 | 0 | 0 | |
| 573-6 | 126 | 3543207 | 0 | 0 | 26.7 | 1411255 | 46.2 | 1568216 | 0 | 0 | 0.4 | 10647 | |
| 846-6 | 0.6 | 26012 | 0.1 | 12416 | 0 | 0 | 0.5 | 13596 | 0 | 0 | 0 | 0 | |
| 850-6 | 19.2 | 416234 | 0 | 0 | 0.5 | 34967 | 0.6 | 19802 | 0 | 0 | 0 | 0 | |

## B6 Pension Base Details (New)



excelExtract.aspx [Read-Only]

| Agency | Retirement System | Fund | Appropriation Type | Total FTEs | Total Pension Base | Faculty FTEs | Faculty Pension |
|---|---|---|---|---|---|---|---|
| 380 | H1 - Hi Ed Pension System--5% Contribution Rate | 001 - General Fund - Basic Account | 1 | 60 | 3678085 | 30.9 | 23 |
| 380 | H1 - Hi Ed Pension System--5% Contribution Rate | 145 - Inst of Hi Ed-Grants/Contracts Acct | 6 | 3.9 | 156491 | 0.6 | |
| 380 | H1 - Hi Ed Pension System--5% Contribution Rate | 148 - Inst of Hi Ed-Dedicated Local Acct | 6 | 7.6 | 314795 | 0.3 | |
| 380 | H1 - Hi Ed Pension System--5% Contribution Rate | 522 - Inst of Hi Ed-associated Students | 6 | 1 | 40785 | 0 | |
| 380 | H1 - Hi Ed Pension System--5% Contribution Rate | 570 - Inst of Hi Ed-other Enterprises | 6 | 4.1 | 204667 | 0 | |
| 380 | H1 - Hi Ed Pension System--5% Contribution Rate | 573 - Inst of Hi Ed-housing & Food Acct | 6 | 8.9 | 349163 | 0 | |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 001 - General Fund - Basic Account | 1 | 232.5 | 18601191 | 166.8 | 141 |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 145 - Inst of Hi Ed-Grants/Contracts Acct | 6 | 9.8 | 589588 | 2.1 | 1 |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 148 - Inst of Hi Ed-Dedicated Local Acct | 6 | 12.4 | 737054 | 0.7 | |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 443 - Inst of Hi Ed-data Processing Acct | 6 | 1 | 69862 | 0 | |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 522 - Inst of Hi Ed-associated Students | 6 | 3.2 | 172025 | 0 | |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 524 - Inst of Hi Ed-bookstore Account | 6 | 1.1 | 62300 | 0 | |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 570 - Inst of Hi Ed-other Enterprises | 6 | 6 | 305716 | 0 | |
| 380 | H2 - Hi Ed Pension System--7.5% Contribution Rate | 573 - Inst of Hi Ed-housing & Food Acct | 6 | 6.7 | 391102 | 0 | |
| 380 | H3 - Hi Ed Pension System--10% Contribution Rate | 001 - General Fund - Basic Account | 1 | 311.1 | 29765879 | 200.1 | 202 |
| 380 | H3 - Hi Ed Pension System--10% Contribution Rate | 145 - Inst of Hi Ed-Grants/Contracts Acct | 6 | 6.7 | 424637 | 2.3 | 1 |
| 380 | H3 - Hi Ed Pension System--10% Contribution Rate | 148 - Inst of Hi Ed-Dedicated Local Acct | 6 | 18.2 | 1369085 | 4.8 | 3 |
| 380 | H3 - Hi Ed Pension System--10% Contribution Rate | 443 - Inst of Hi Ed-data Processing Acct | 6 | 0.5 | 32803 | 0 | |

## Step 7: Adding Vacants

**Once you have run your B6 extracts and have determined the types of positions that are vacant, you are ready to add your vacant positions. This determination should be based on budgeted FTEs—especially FTEs charged to GF-S (001-1). OFM will compare your final 001 FTE and salary level to your FY 2015 actuals, and will compare the total operating budgeted FTEs to your operating Next Biennium Maintenance Level as a reasonability check.**

For example, you may find that you are missing 27 faculty positions, 3 custodial positions, 4 administrators, and 2 accounting positions. You can, if you wish, load each position one at a time. However, you can also create one "average" position for each category, and then clone it. After each position is cloned, you can go into individual positions and tweak them for funding variation, etc., but the easiest way to do this is to create the average faculty, using a reasonable average fund split, assumption about retirement system, insurance eligibility, etc., and just clone that one position 26 times and be done with it.

To do this, you'll need to have the following information for each type of vacant position:

- Description (this can be a person's name, or a description of the position, such as "Vacant Custodial";
- Working Title;
- Bargaining Unit Code;
- Classified under RCW 41.06, or Exempt;
- Job Class Code;
- Position Type;
- Salary Range;
- Salary Step;
- Whether the salary unit is Monthly or Hourly;
- Salary Unit Amount (base pay amount for the range/step);
- Work Period Percent
- Position Start Date (should be a future date)
- Number of Months per year the position works;
- Whether the incumbent would be a student, graduate student, or not a student (drop down box);
- Work County (drop down box);
- EEO Code (drop down box);
- Retirement System Code;
- Eligible (or not) for Health Insurance;
- Whether the position requires backfill

This completes the first screen; save this data, and then you will be taken to a funding screen.

On the funding screen, you will need to add funding sources that add up to 100% of the funding for this position. It can be one source, or numerous sources, but before it can be saved to the database, the total funding must be 100%.

So, if you have your list of vacant positions at the ready, return to the Main Menu and select Add Vacant. Fill in the necessary fields, and at the bottom of the screen, click on Save Person and Compensation Data.

Description:

Working Title:

Bargaining Unit Code:

Classified by RCW:
- Subject to the civil service provisions of RCW chapter 41.06 (Classified)
- Exempt from the civil service provisions of RCW chapter 41.06

Job Class Code:

Salary Range:

Salary Step:

Top of Pay Scale: Unknown if at top of pay scale

Position Type:

Salary Unit Code:

Salary Unit Amount:
(See text box tool tip):

Work Period Percent:

Position Start Date:

Number of Months:

Budgeted Monthly Salary: $0

**FTEs for this position:**

Student Job: Not a Student

Work City / County: Select a City | Select a County

EEO/IPEDS Code: Select a EEO selection

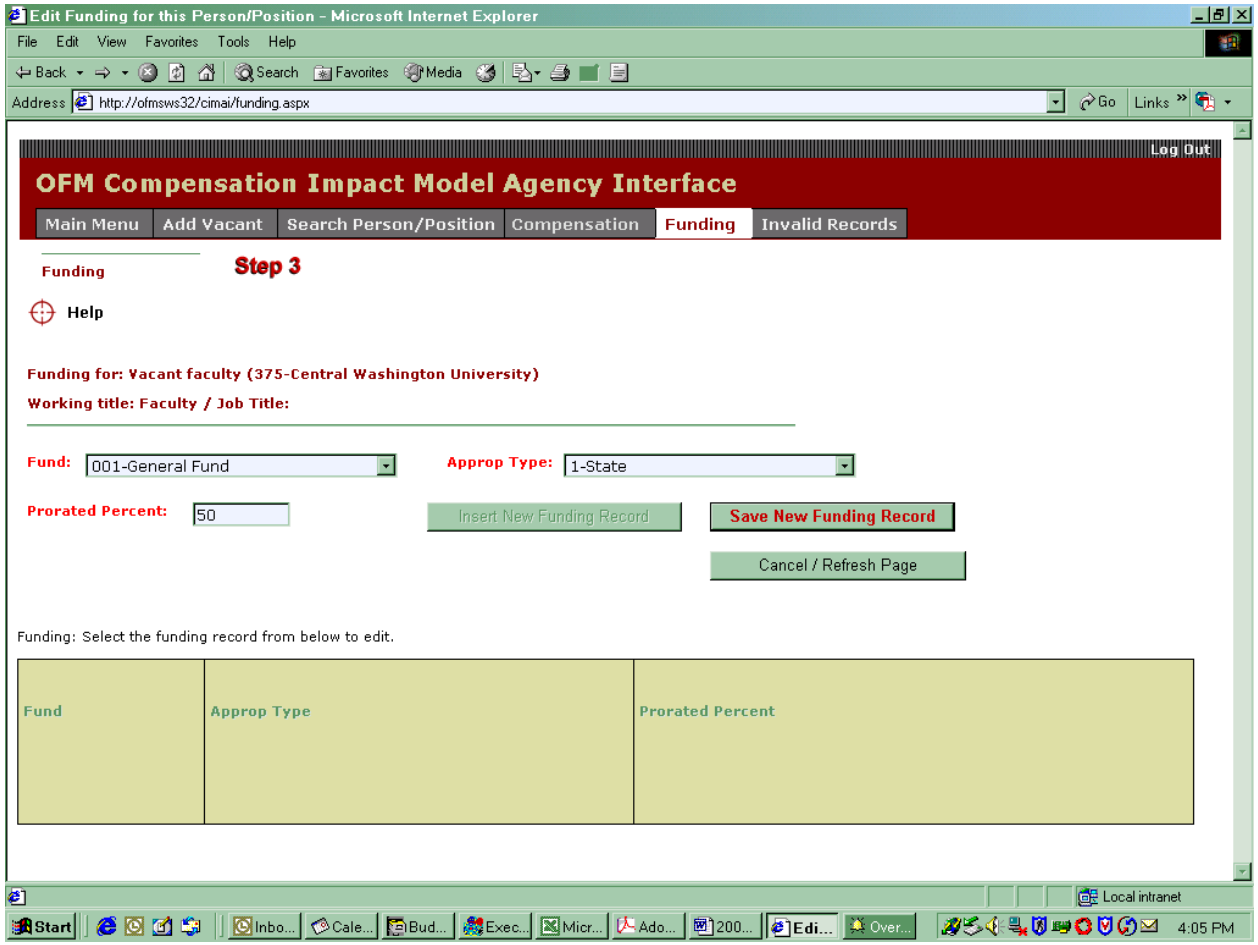
Retirement Plan Code: Select a Retirement System

Pay Scale Type: Select a Pay Scale Type

Pay Scale Area: Select a Pay Scale Area

Workers Compensation Risk Class Code: - Select a Risk Class

You will then be taken to the Funding screen, where you first click on Insert New Funding Record in the middle of the screen. Insert each funding source with the appropriate fund and approp type, and the prorated percent amount; then click on Save New Funding Record.



Continue adding funding sources until you reach 100% for this record.

**Funding for: Faculty w/Hlth Ret-H1 (365-Washington State University)**

**Working title: FT Faculty / Job Title:**

**Fund:** 843-Exceptional Faculty Award Endo

**Approp Type:** 6-Nonappropriated Funds

**Prorated Percent:** 25

Insert New Funding Record

Save New Funding Record

**Funding is at 75% for this position. It must be 100%.**

Cancel / Refresh Page

Funding: Select the funding record from below to edit.

| Fund | Approp Type | Prorated Percent |
|---|---|---|
| 001-General Fund | 1-State | 50.0 |
| 145-Inst of Hi Ed-Grants/Contracts Acct | 6-Non Appr | 25.0 |
| | | |

This example shows a completed funding record with three funding sources, and funding totals 100%. You are now finished with this vacant record.

**Funding for: Faculty w/Hlth Ret-H1 (365-Washington State University)**

**Working title: FT Faculty / Job Title:**

**Fund:** **Approp Type:**

**Prorated Percent:** Insert New Funding Record Save Changes

**Funding is at 100% for this position.** Cancel / Refresh Page

Funding: Select the funding record from below to edit.

| Fund | Approp Type | Prorated Percent | Select/Edit | Delete |
|---|---|---|---|---|
| 001-General Fund | 1-State | 50.0 | | Delete |
| 145-Inst of Hi Ed-Grants/Contracts Acct | 6-Non Appr | 25.0 | | Delete |
| 843-Exceptional Faculty Award Endowment | 6-Non Appr | 25.0 | | Delete |
| | | | | |

## Step 8. Replicate Vacants

**Best Practice: Run the invalid records check *again* before replicating records, so that you don't get numerous clones with the same error(s). Note: if you forget and have clones with errors, you can mass delete the clones, fix the error and then re-replicate.**

**IMPORTANT NOTES:**

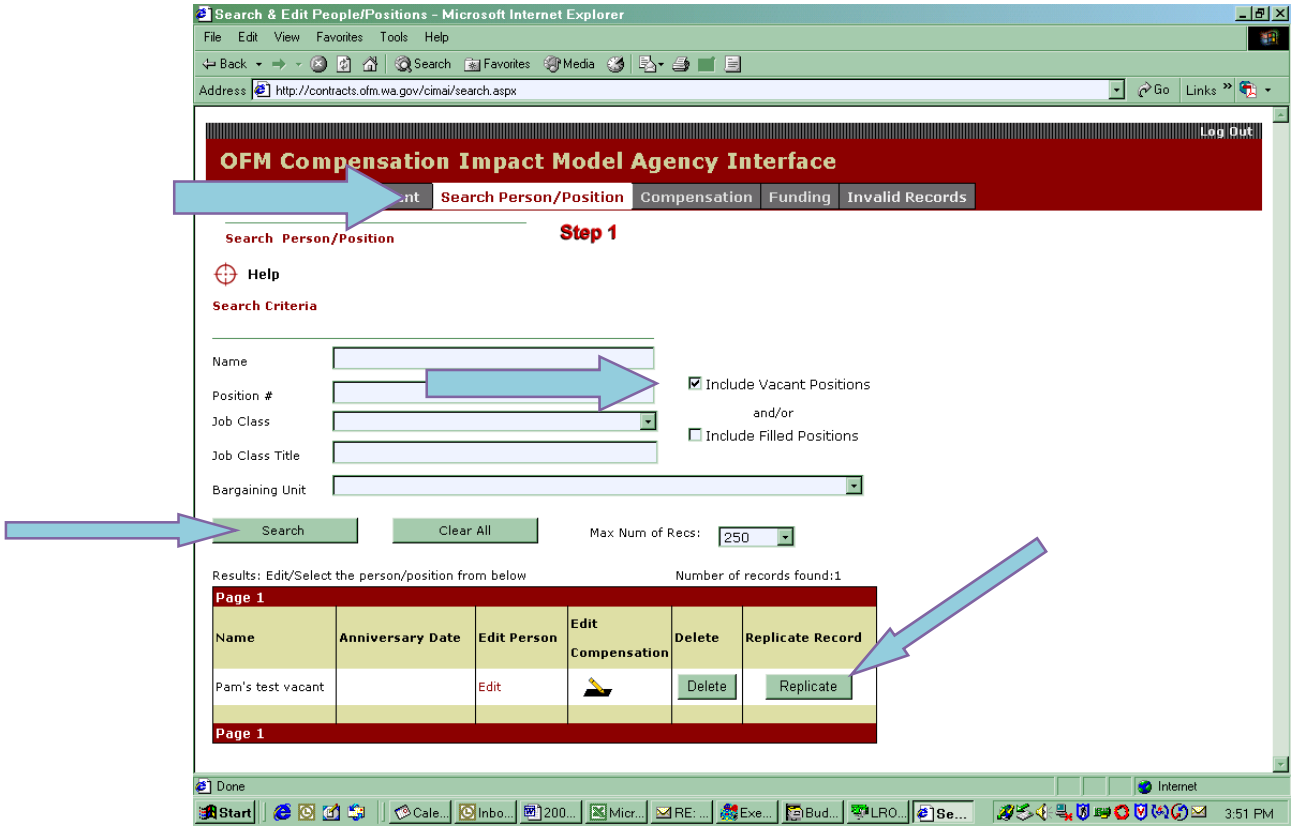
1. You cannot delete a parent record unless you first delete all of its cloned copies.

2. You can delete cloned copies one at a time, which makes sense if you only need to delete a few.

3. You can mass delete all the cloned copies of a parent record if you don't change their name(s) in the person record of the cloned copies.

4. **If you clone a clone and plan to replicate the clone, CHANGE THE NAME of the clone you plan to replicate in the person portion of the record *before cloning***. If you don't and you later delete clones of the parent clone, *you will also delete all of the clones of the child clone that is also a parent*.

When you have finished adding one each of your vacant records, and are ready to clone them, go from the Funding Screen to the Search Person/Position screen. Check the box Include Vacant Positions, and uncheck the box Include Filled Positions, and click on Search. This will give you the full list of every vacant position you added. Choose one position to start with, and click on Replicate Record on the right side of the record.



The replication screen appears, as below, recapping the detail of the position, with a box at the top, which you fill in with the number of times you want this position replicated (from 1 to 999 times). Fill in the box, and click on Replicate.

**Help**

Enter the number of Copies you would like to create (1 to 999) [ ] Replicate

Please review this record carefully before replicating it. It cannot be changed on this form. Once you launch the replication process it cannot be halted.

**Parent record details**

Vacant position created by Julie Mullikin on Dec 3 2015

**Position/Compensation details**

Description: description

Working Title: working title

Western Washington University

Bargaining Unit: 0044

Classified by RCW: Exempt from the civil service provisions of RCW chapter 41.06

FTE for this position: 1.0000

Job Class:

Salary Range: 99999999

Salary Step: 99

Salary Unit: MONTHLY

Percent of Time Worked: 100.0000

Salary Amount: $2,676.00

Position Start Date: 7/1/2016

Number of Months for this position: 12

Retirement System: L2-Law Enforcement Officiers and Fire Fighters--Plan II

Work County: Cowlitz County

EEO Code: 00-Unclassified or not reported

Student Job: Not a Student

Here’s the continuation of the replication screen.

Position Start Date: 7/1/2016

Number of Months for this position: 12

Retirement System: L2-Law Enforcement Officiers and Fire Fighters--Plan II

Work County: Cowlitz County

EEO Code: 00-Unclassified or not reported

Student Job: Not a Student

☐ Position Backfill Flag ☑ Eligible for Insurance

**Funding details** **Funding is at 100% for this position**

| Fund | Approp Type | Prorated Percent |
|---|---|---|
| 001-General Fund | 1-State | 100.0 |
| | | |

Once your click on Replicate, a dialogue box will ask you if you are sure you want to replicate the position XX # of times. If you are sure, then click on OK.

Enter the number of Copies you would like to create (1 to 999) 25 Replicate

Please review this record carefully before replicating it. It cannot be changed on this form. Once you launch the replication process it cannot be halted.

**Parent record details**

Vacant position created by Pamela Johnson on Dec 9 2009

**Position/Compensation details**

Description: Faculty w/Hlth Ret-H1

Working Title: FT Faculty

Washington State University

Bargaining Unit: 0019

Classified by RCW: Exempt from the civil service provisions of RCW chapter 41.06

FTE for this position: 0.7500

Job Class:

Salary Range:

Salary Step:

Salary Unit: MONTHLY

You will then get a message indicating that you have been successful in your replication task. Repeat your needed replications, and remember that, if you need to, you can adjust individual records by going back to the Search Person/Position screen, search for all vacants, then Click on Edit Compensation to drill down and change either Compensation record information (job class, insurance eligibility, bargaining unit, etc.) or Funding information.

Enter the number of Copies you would like to create (1 to 999) 25 Replicate

Success, you created 25 copies of this vacant position.

**Parent record details**

Vacant position created by Pamela Johnson on Dec 9 2009

**Position/Compensation details**

Description: Faculty w/Hlth Ret-H1

Working Title: FT Faculty

Washington State University

Bargaining Unit: 0019

Classified by RCW: Exempt from the civil service provisions of RCW chapter 41.06

FTE for this position: 0.7500

Job Class:

Salary Range:

Salary Step:

Cloned Records have the name of the Parent Record suffixed with a hyphen and number.

**Search Criteria**

Name

Position #

Job Class

Job Class Title

Bargaining Unit

☑ Include Vacant Positions

and/or

☐ Include Filled Positions

or

☐ Non-Replicated Vacants Only

Search | Clear All | Max Num of Recs: 250

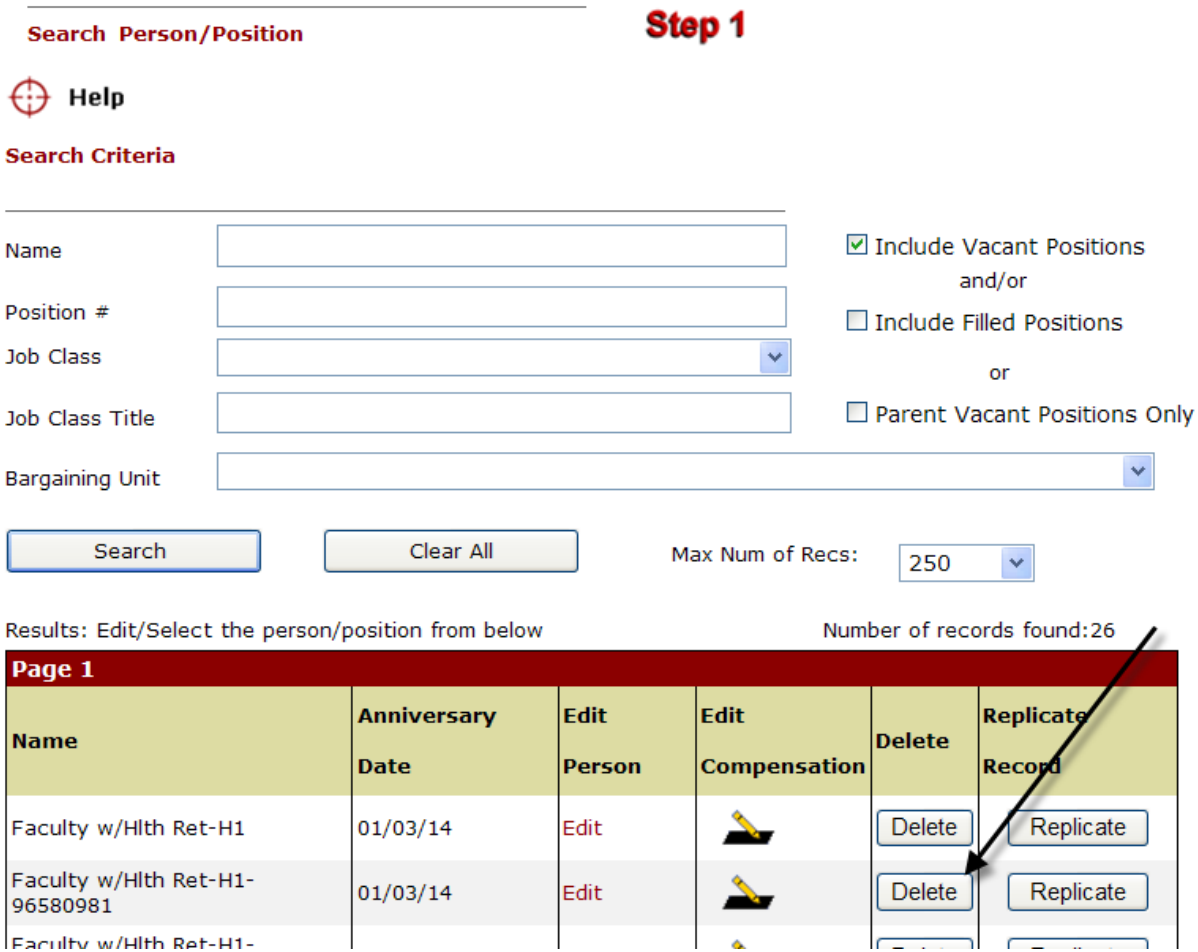
Results: Edit/Select the person/position from below — Number of records found:26

**Page 1**

| Name | Anniversary Date | Edit Person | Edit Compensation | Delete | Replicate Record |
|---|---|---|---|---|---|
| Faculty w/Hlth Ret-H1 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525922 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525923 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525924 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525925 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525926 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525927 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525928 | | Edit | | Delete | Replicate |

# Instructions for Deleting a Single Clone Record

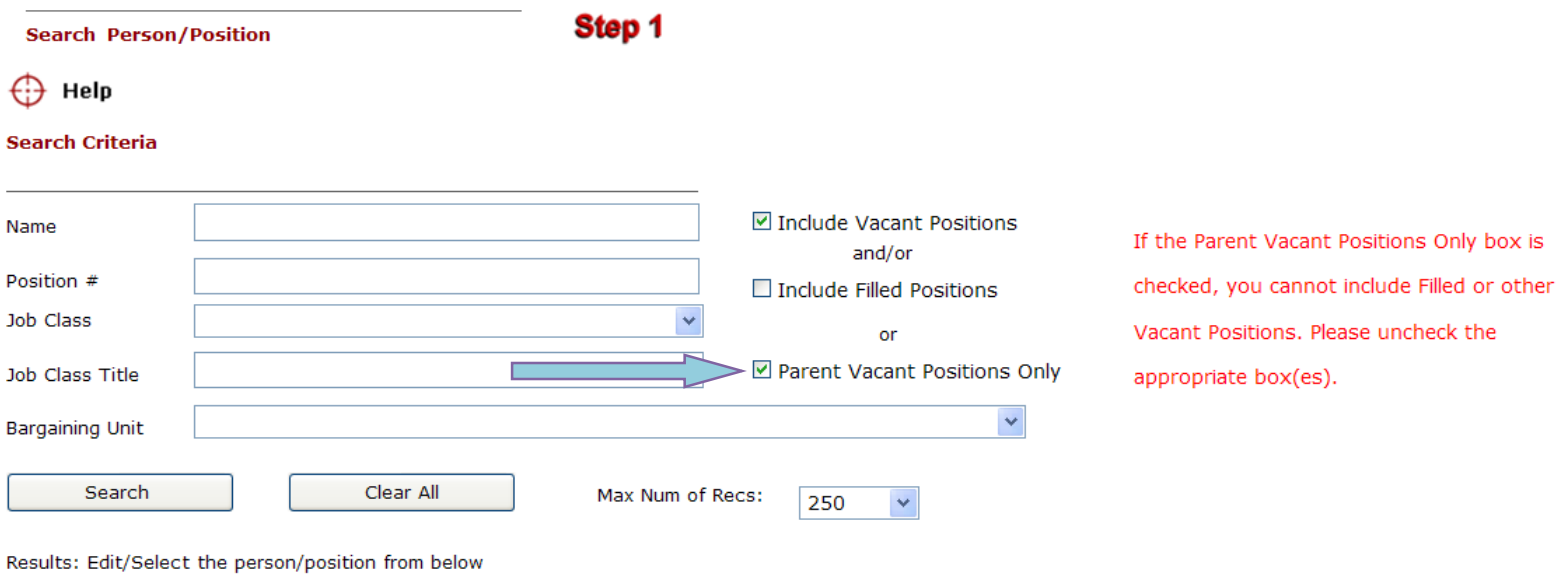
1. Open the Search Person/Position Screen.
2. Check the Include Vacant Positions checkbox.
3. Complete any other Search Criteria and then Click the Search button.
4. Click the Delete button for one of the cloned records.



# Instructions for Mass Deletion of Cloned Records

If you discover that you have created too many copies, you can mass delete all clones of a given parent record and then re-replicate the correct number of records using the following steps:

1. Open the Search Person/Position Screen.
2. Check the Non Replicated Vacant Positions Only box (and uncheck any other boxes)
3. If you have other boxes checked, you will get this error.



4. Complete any other Search Criteria and then Click the Search button.

**Search Person/Position** **Step 1**

**Help**

**Search Criteria**

Name: Vacant*Prof*

Position #:

Job Class:

Job Class Title:

Bargaining Unit:

☑ Include Vacant Positions

and/or

☐ Include Filled Positions

or

☐ Parent Vacant Positions Only

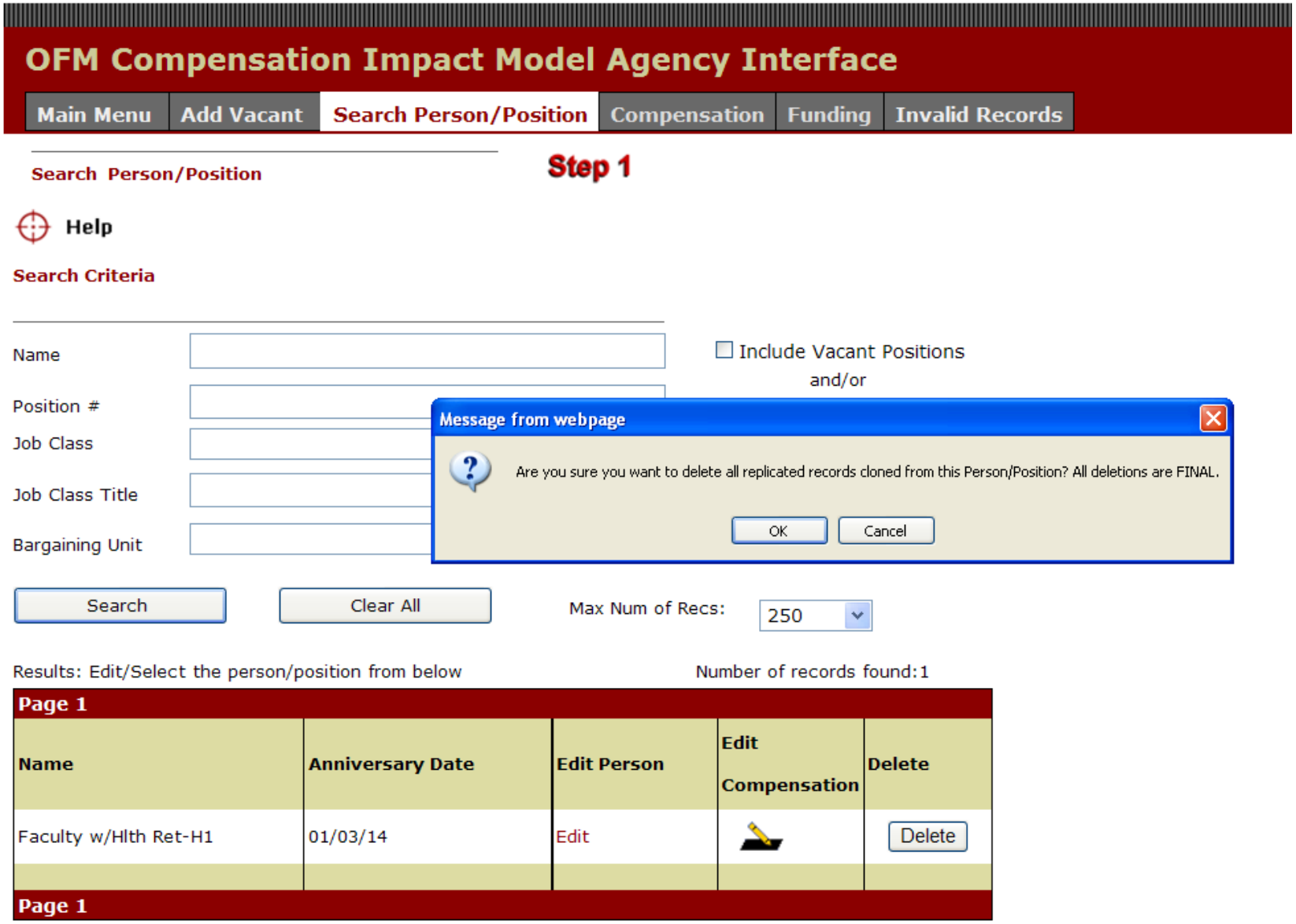
Search | Clear All | Max Num of Recs: 250

Results: Edit/Select the person/position from below — Number of records found:35

**Page 1**

| Name | Anniversary Date | Edit Person | Edit Compensation | Delete | Replicate Record |
|---|---|---|---|---|---|
| Vacant - Assoc Prof | 07/01/12 | Edit | | Delete | Replicate |
| Vacant - Assoc Prof-96575482 | 07/01/12 | Edit | | Delete | Replicate |
| Vacant - Assoc Prof-96575483 | 07/01/12 | Edit | | Delete | Replicate |
| Vacant - Assoc Prof-96575484 | 07/01/12 | Edit | | Delete | Replicate |
| Vacant - Assoc Prof-96575485 | 07/01/12 | Edit | | Delete | Replicate |

5. Click the Delete Button of the parent record. You will get an opportunity to cancel the delete.




6. If you have selected the correct Parent Record, then click OK.

7. You will get confirmation that the Cloned Records have been deleted.

Cloned Records Successfully Deleted

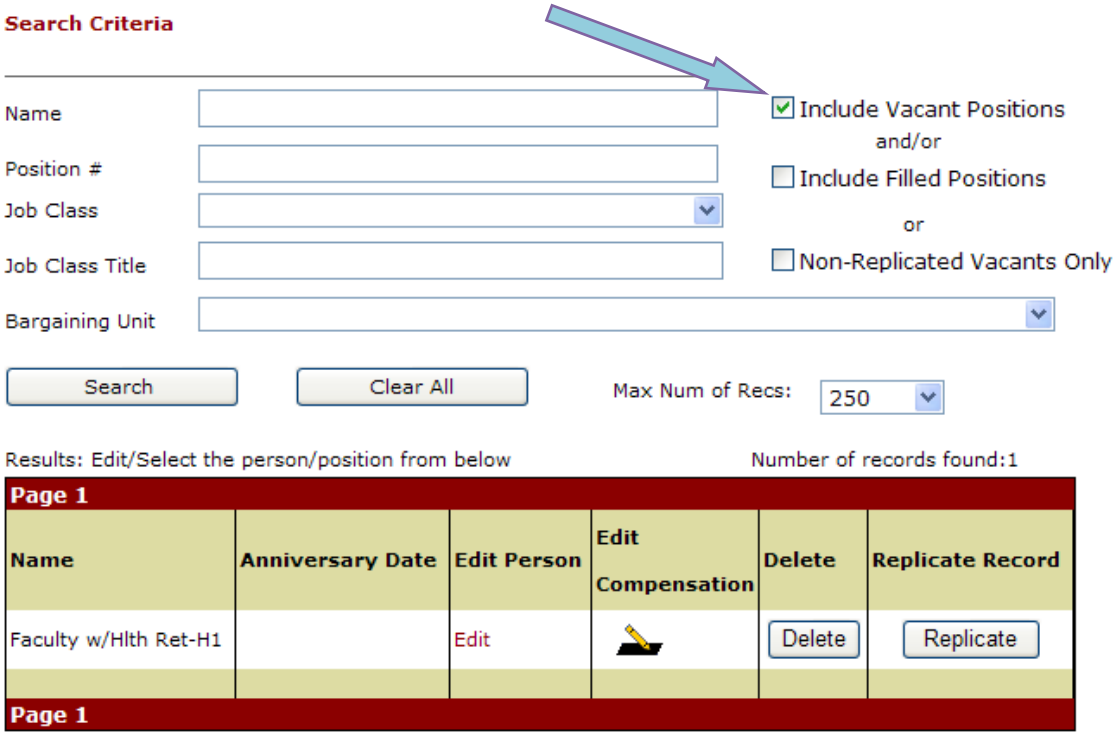
Number of records found:1

Page 1

| Name | Anniversary Date | Edit Person | Edit Compensation | Delete |
|---|---|---|---|---|
| Faculty w/Hlth Ret-H1 | | Edit | | Delete |

Page 1

8. Uncheck the Non-Replicated Vacants Only box, and re-check the Include Vacant Positions box. Then click Search.



9. Now you can re-replicate the Parent Record with the correct number of clones.

   a. Click Edit Person

Results: Edit/Select the person/position from below  Number of records found:26

**Page 1**

| Name | Anniversary Date | Edit Person | Edit Compensation | Delete | Replicate Record |
|---|---|---|---|---|---|
| Faculty w/Hlth Ret-H1 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525922 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525923 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525924 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525925 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1- | | Edit | | Delete | Replicate |

# Replicating Cloned Records

Important Notes: If you clone a clone, it becomes a parent record.

If you clone a clone without renaming it and later perform a mass delete of the original parent, the clones of *both parent records will be deleted*. Therefore, *it's best to* ***always rename the clone that you intend to replicate***!

1. Change the name of the Clone to be Replicated:
   a. Click the Edit button in the Edit Person column.
   b. Remove the suffix (hyphen and number).
   c. Change the Name to reflect the difference.
   d. Click Update

2. Proceed with the "normal" replication process as outlined in Step 8 above.

Results: Edit/Select the person/position from below Number of records found:26

**Page 1**

| Name | Anniversary Date | Edit Person | Edit Compensation | Delete | Replicate Record |
|---|---|---|---|---|---|
| Faculty w/Hlth Ret-H1 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H2 | | Update Cancel | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525923 | | Edit | | Delete | Replicate |
| Faculty w/Hlth Ret-H1-96525924 | | Edit | | Delete | Replicate |

## Step 9: Rerun Extracts

After adding vacancies and duplicating as needed, rerun your B6 Salary & FTE, Pension Base & Insurance Head Count extracts to determine if you have reached an accurate FTE, base salary, pension base, and insurance head counts by account.

Note: The New Insurance Head Count extract provides fund splits based on the Higher Education Fund Splits you provide to OFM. Notify Pam Davidson if your Health Care fund splits need to be updated.

## Step 10:

Repeat Steps 7 through 9 until you have accurate FTE, base salary, pension base, and insurance head counts by account for your Next Biennium maintenance levels.

You should run the Invalid Records Check one last time as well.

## Final Step

Once everything is complete, notify Pam Davidson at Pam.Davidson@ofm.wa.gov that you are finished with your CIM data.