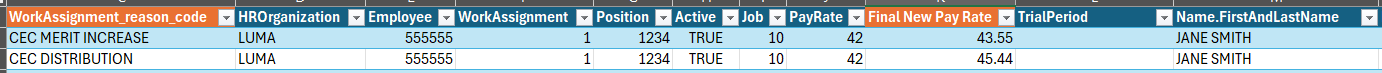
**CEC Timeline**

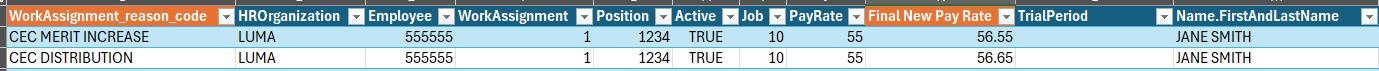
* **April 25**: CEC plan emailed to DHR/DFM for review
* **May 19 – June 13**: ISD uploads to complete actions in CEC (involves the request, data input into the ISD template, approvals, ISD upload, and data validation)
  + May 21: ISD Office Hours
  + May 28: ISD Office Hours
  + June 4: ISD Office Hours
  + June 11: ISD Office Hours
* **June 4:** Last day to request your template (any later date requires Bureau Chief approval)
* **June 6:** Last day to submit your spreadsheet to allow for testing and approvals
* **June 8**: Effective date for CEC
* **June 13**: Last day that Systems and Data team can upload to the system
* **July 3**: CEC reflected on pay checks for eligible employees

**CEC Increase Amounts and Reasons**

* $1.05 - $1.55 Increase for Employees in Permanent Position Based on Merit
  + Work Assignment Reason Code: **CEC MERIT INCREASE**
  + Comment (filled in by Systems and Data Team): FY 2026 CEC Merit Increase approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
    - Comments will be added to the spreadsheet once the agency returns the template prior to uploading it into Luma.
* Merit plus 4.5% Increase for IT and Engineering Employees
  + The first line for these employees should be the $1.05 - $1.55 based on the merit increase from above.
  + Work Assignment Reason Code: **CEC MERIT INCREASE**
  + Comment (filled in by Systems and Data Team): FY 2026 CEC Merit Increase approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
  + The second line for these employees should be 4.5% based off the base rate of the employee prior to the Merit increase.
  + Work Assignment Reason Code: **CEC DISTRIBUTION**
  + Comment (filled in by Systems and Data Team): FY 2026 CEC IT ENG approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
    - Comments will be added to the spreadsheet once the agency returns the template prior to uploading it into Luma.
  + For example:
    - Jane makes $42.00 an hour and receives an exemplary rating; the spreadsheet would reflect $43.55 first and the final rate $45.44 second, the highest pay rate must be last:



* Merit then greater of $1.55 or 3% Increase for Nursing and Healthcare Employees
  + The first line for these employees should be the $1.05 - $1.55 based on the merit increase from above.
  + Work Assignment Reason Code: **CEC MERIT INCREASE**
  + Comment (filled in by Systems and Data Team): FY 2026 CEC Merit Increase approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
  + The second line for these employees should be the difference after Merit:
  + Work Assignment Reason Code: **CEC DISTRIBUTION**
  + Comment (filled in by Systems and Data Team): FY 2026 CEC NURSING HC approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
    - Comments will be added to the spreadsheet once the agency returns the template prior to uploading it into Luma.
  + For example, Jane makes $55.00 an hour and receives an exemplary rating, the spreadsheet would reflect $56.55 first for Merit and then $56.65 for CEC Distribution:



* 8% Increase for Idaho State Police Troopers
  + Work Assignment Reason Code: **CEC DISTRIBUTION**
  + Comment (filled in by Systems and Data Team): FY 2026 CEC TROOPER approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
    - Comments will be added to the spreadsheet once the agency returns the template prior to uploading it into Luma.
* Targeted CEC Line-Items
  + Work Assignment Reason Code: **CEC DISTRIBUTION**
  + Comment (filled in by Systems and Data Team): FY 2026 Line-item Targeted CEC Distribution approved by Agency HR NAME, Agency Finance NAME, DFM NAME via CS00XXXXX.
    - Comments will be added to the spreadsheet once the agency returns the template prior to uploading it into Luma.
* Payline Moves (for Classified Employees) \*
  + Work Assignment Reason Code: **C PAYLINE MVMT UP**
  + Comment: FY 2026 Payline Movement Up
  + Note: Payline Moves for Classified Employees should be entered into Luma as Change Pay Rate actions. These will not be done via ISD upload. Payline actions can be entered into the system on 6/082025 or after the CEC ISD upload is completed, whichever date occurs last.

**CEC ISD Upload Process**

Initiation by Agency:

* Agency HR needs to submit a ticket to request the CEC ISD upload template once their actions have stopped in the system.
* Agency HR will submit a [DHR Luma Request](https://idahosco.servicenowservices.com/sp?id=sc_cat_item&sys_id=34b139f187fdd2507518ea470cbb356f) in the Service Now (SNOW) system. Description: “CEC ISD Request for Agency XXX. Please include the following individuals on this incident: (Names of HRO, CFO, DFM)”.
* Once the agency has requested their CEC ISD Template, certain actions should not be submitted in the system as it could cause issues with the employee profile, their pay increase, SCO tickets, manual admin corrections and incorrect data.
  + Note: During this period the actions that should not be submitted only applies to actions related to employees that are receiving the CEC Distribution/CEC Merit Increases (i.e., position and job updates, work assignment updates, transfers, promotions, etc.). The upload period does not include new hire, rehire, termination actions, or creating a new position.
    - Why is there a request to hold certain actions? If the CEC ISD spreadsheet has been uploaded, the actions will not be visible in the system until 6/8/2025. Any actions that touch those employees’ jobs, positions, or work assignments will cause the ISD to revert the employee’s data back to previous information.
    - For example, John Doe is getting a CEC pay increase on the ISD spreadsheet and it’s uploaded into Luma on 5/23/2025 with an effective date of 6/8/2025. Then a promotion action is processed for John Doe with an effective date of 5/26/2025, the CEC ISD upload will “undo” the promotion action on 6/8/2025 because the data on the ISD spreadsheet was pulled before the promotion action was completed.
* How should I handle actions that need to be submitted:

## Can I terminate someone?

* + - Yes
      * If they are listed on your CEC ISD upload and it has already been processed, and the effective date is before 6/8/2025, please submit a DHR Luma Request with the name, effective date of termination and your ISD ticket number.
      * If they are listed on your CEC ISD upload and it has been submitted but not yet uploaded, please comment as soon as possible in the ISD Upload ticket.
      * If you have not submitted your CEC ISD upload, no need to let us know, please ensure you remove them from the upload.

## Can I hire or rehire someone?

* + - Yes

## Can I transfer an employee from **another agency**?

* If the effective date is 5/21-6/13, please submit a DHR Luma request and include the other agency on the watchlist with the situation.
* If the effective date is 6/14 or later, go ahead and enter after 6/14.

## Can I promote or transfer someone **within my agency**?

* + - Is the employee eligible for and receiving CEC?
      * If the effective date is 5/21-6/7, they are listed on your CEC ISD upload and it has already been processed, please submit a DHR Luma Request with the name, effective date of promotion and your ISD ticket number.
      * If the effective date is 6/8 or later, process the promotion/transfer action 6/08/2025 or once the ISD upload is completed whichever date occurs last.
      * If they are listed on your CEC ISD upload and it has been submitted but not yet uploaded, please comment as soon as possible in the ISD Upload ticket to notify Systems and Data Team to hold pending further conversation.
    - Is the employee not eligible for CEC?
      * Yes, you can proceed.

## Can I update a work assignment?

* + - Is the employee eligible for and receiving CEC?
      * If the effective date is 5/21-6/7, they are listed on your CEC ISD upload and it has already been processed, please submit a DHR Luma Request with the name, effective date of update, what you need to update and your ISD ticket number.
      * If the effective date is 6/8 or later, process the update work assignment action 6/08/2025 or once the ISD upload is completed whichever date occurs last.
      * If they are listed on your CEC ISD upload and it has been submitted but not yet uploaded, please comment as soon as possible in the ISD Upload ticket to notify Systems and Data Team to hold pending further conversation.
    - Is the employee not eligible for CEC?
      * Yes, you can proceed.

## Can I add a work assignment?

* + - Yes.

## Can I inactivate a work assignment?

* + - Is the employee eligible for and receiving CEC?
      * If the effective date is 5/21-6/7, they are listed on your CEC ISD upload and it has already been processed, please submit a DHR Luma Request with the name, effective date of update, what you need to update and your ISD ticket number.
      * If the effective date is 6/8 or later, process the inactivate work assignment action 6/08/2025, once the ISD upload is completed OR when the employee has received final pay whichever date occurs **last**.
      * If they are listed on your CEC ISD upload and it has been submitted but not yet uploaded, please comment as soon as possible in the ISD Upload ticket to notify Systems and Data Team to hold pending further conversation.
    - Is the employee not eligible for CEC?
      * Yes, you can proceed.

## Can I update an employee’s pay rate?

* + - Is the employee eligible for and receiving CEC?
      * If the effective date is 5/21-6/7, they are listed on your CEC ISD upload and it has already been processed, please submit a DHR Luma Request with the name, effective date of update, what you need to update and your ISD ticket number.
      * If the effective date is 6/8 or later, process the change pay rate action 6/08/2025 or once the ISD upload is completed whichever date occurs last.
      * If they are listed on your CEC ISD upload and it has been submitted but not yet uploaded, please comment as soon as possible in the ISD Upload ticket to notify Systems and Data Team to hold pending further conversation.
    - Is the employee not eligible for CEC?
      * Yes, you can proceed.

## Can I update a position?

* + - Is this position filled with an employee eligible for and receiving CEC?
      * If the effective date is 5/21-6/7, they are listed on your CEC ISD upload and it has already been processed, please submit a DHR Luma Request with the position number, effective date of update, what you need to update and your ISD ticket number.
      * If the effective date is 6/8 or later, process the update action 6/08/2025 or once the ISD upload is completed whichever date occurs last.
      * If they are listed on your CEC ISD upload and it has been submitted but not yet uploaded, please comment as soon as possible in the ISD Upload ticket to notify Systems and Data Team to hold pending further conversation.
    - Is this position vacant?
      * Yes, you can proceed.

## Can I create a new position?

* + - Yes.

## Can I request HR Org Unit updates/creation for my agency?

* + - If you have not started your CEC ISD upload process
      * Yes, but ensure these are completed prior to requesting your CEC template.
    - If you have started your CEC ISD upload process
      * No, please request these updates 6/08/2025 or once your ISD upload is completed whichever date occurs last.

## Can I request location updates/creation for my agency?

* + - If you have not started your CEC ISD upload process
      * Yes, but ensure these are completed prior to requesting your CEC template.
    - If you have started your CEC ISD upload process
      * No, please request these updates 6/08/2025 or once your ISD upload is completed whichever date occurs last.

## Can I process a special incentive or time record?

* + - Yes

Ticket Management:

* Systems and Data Team will attach an ISD template in the ticket for the agency to update.
* The QUERY tab is the raw data from Luma. Please do not work on the QUERY tab, this is in case we need to re-query the data for your agency.
* The UPLOAD tab is where the agency will make edits and what the Systems and Data Team will upload into the system.

Scribe Resource: [**How to Populate Agency ISD Upload Worksheet**](https://scribehow.com/shared/CEC_How_to_Populate_Agency_ISD_Upload_Worksheet__itRgKXZdTBm_0EDyRjQ96Q)

* Note: this process may not work for those employees who have two lines, which are the IT - Engineering Salary Structure and Nursing - Healthcare Salary Structure.

Agency Updates and Submission:

* For all fields on the ISD spreadsheet we provide you, we are pulling the data directly from the system. If there are discrepancies or issues, please work with Agency HR to review the data in Luma and correct if needed. To correct, wait until 6/08/2025 or until the ISD upload is completed whichever date occurs last.
* The Systems and Data team will add two lines for anyone that has a job with the IT -Engineering or Nursing - Healthcare Salary Structures, if an employee is only eligible for one, please delete the second line from the spreadsheet.
  + If someone is not showing with two lines, please work with the Systems and Data team in the ISD upload ticket prior to adding to the spreadsheet.
* On the UPLOAD tab, the Agency will update the *Work Assignment Reason Code* (see CEC Increase Amounts and Reasons for appropriate reason code) and the *Pay Rate* column with the employee’s new base pay rate. **Please do NOT update any data in the other columns**.
  + Note: Pay Rate can be no more than two decimal places.
* Please remove employees from the spreadsheet that are not receiving a CEC increase by deleting the entire row from the spreadsheet.
  + Note: Employees that may need to be removed from the CEC ISD upload templates include, but are not limited to, directors and/or workflow approvers. (Workflow approvers cannot approve their own pay rate increase, i.e. Agency HR or Agency Finance.) These individuals must have their increases submitted as Change Pay Rate actions in Luma.
* Once ready, the agency attaches the updated template to the ticket, indicating readiness for approvals and upload.
  + Note: Prior to submitting the final spreadsheet for upload, please review the CEC Plan Variation guidance below for items needed for your DHR Bureau Chief approvers and DFM analyst.

CEC Plan Variations for DHR/DFM Approvers

* If there are any variations to the plan that was submitted to and approved by DHR/DFM, the agency will need to list the variations in the comments of the ticket to include but not limited to:
  + Any terminations that have happened since the plan was approved
  + Employees that have transferred agencies
  + Pay rate differences due to appraisals
* In addition, please highlight the cells that contain variations from your approved plan in yellow on your ISD spreadsheet.
* If any of these actions will result in a reduced reversion amount (for example, you hired an employee from another agency who is eligible for CEC) please work with your DFM analyst to ensure a modified CEC plan is submitted.
* Please note any employees who do not meet the FY26 minimum of the pay scale change. Those employees should only receive the amount that brings them to the new minimum. They will receive the remainder (if any) of their CEC upon completion of probation.

Upload in Test Environment:

* Systems and Data Team will upload the spreadsheet provided by the agency into a test environment to ensure data is uploaded successfully with no errors.
* If errors are encountered, Systems and Data Team will work with the agency to resolve issues with the template. Agency will need to re-attach a corrected template to the ticket and the Systems and Data Team will re-upload the template into the test environment until there are no errors.
* When there are no errors, the Systems and Data Team will begin the process for approvals.

Approval Process:

* HRO, CFO, and DFM will review the submitted spreadsheet and notate approval in the ticket with the date.
* If updates to the spreadsheet are requested, the agency must make updates and re-attach the CEC ISD template to the ticket. Systems and Data team will re-upload in the test environment and the approval process will be repeated until all parties notate their approval in the ticket with the date.

Upload in Luma:

* Once the template has been approved by all parties, the Systems and Data Team will upload the template into the Luma PRD environment and notate in the ticket once the ISD upload has been completed.
* Agency will be responsible for auditing the data in Luma.

Agency Audit:

* The agency audits the data in Luma, ensuring that employees’ pay rates in Luma match what was on the ISD template that was uploaded.
  + Note: Agency may need to set ‘As of Date’ to 6/08/2025 to see new pay rates.
* Other things to look out for:
  + Employees that are termed prior to the CEC effective date but may have received a CEC increase.
  + If an employee’s new pay rate is not reflected in Luma but they were on the ISD template, compare the ISD template to Luma. Review employee ID number, position number, work assignment number, etc.
    - If the data on the ISD template was inaccurate, the agency must notate what happened in the ticket so the Systems and Data Team can revert the data in Luma that was inadvertently changed.
    - Agency must then submit corrective actions in the system (i.e. Change Pay Rate action and/or Update Work Assignment action).
  + If an employee was inadvertently left off the ISD template and they should have received a CEC pay rate increase, the agency must submit a Change Pay Rate action in Luma.

Confirmation and Closure:

* Upon completion of the audit, the agency must notate in the ticket that the audit has been completed, and all the data is accurate.
* If there are any issues or errors found during the audit, the agency must work with the Systems and Data team to revert the data and/or submit any corrective actions in the system.
* The audit is not considered complete until all the data is accurate and/or all corrective actions have been submitted.
* Once this has been notated in the ticket the Systems and Data Team will close the ticket.

**Diagram

AI-generated content may be incorrect.**

**ISD Process Flow**

1. **Ticket Intake (Agency HR)**
   * Agency HR should initiate the tickets when ready for the action hold period.
     + HRO should not submit the request because they are the final DHR approver.
2. **Review Ticket Details (Systems and Data Team)**
   * Verify the short description is appropriate and all necessary approvers are listed.
   * Provide received response
3. **Initiate CEC Routing (Systems and Data Team)**
   * Begin tracking on the CEC Tracking Spreadsheet.
4. **Assigning Responsibility (Systems and Data Team)**
   * Assign the request to Systems and Data Specialist.
5. **Query Required Data (Systems and Data Team)**
   * Systems and Data Specialist will remove the director from the spreadsheet.
     + Please note: The directors will be processed separately not by the agency.
6. **Provide Initial Spreadsheet (Systems and Data Team)**
   * Upload the spreadsheet into the ticket and provide response.
   * Log the date into the tracking spreadsheet.
7. **Agency Spreadsheet Completion (Agency HR)**
   * **IMPORTANT Agency Tips:** 
     + **Ensure there are no formulas, formatting or filters on the UPLOAD tab when attaching to the ticket for upload. See below for a shortcut to check.**
     + Highlight all deviations from the approved plan with DFM on the ISD Upload sheet in yellow.
     + Delete finance approver or any other person that is part of the CEC process or approval.
     + Delete rows where someone is not being uploaded (for example term pending or on probation.
   * **HRO Checklist**
     + Director CEC will be approved by the Governor’s office and submitted by Central Office.
     + Ensure Agency Finance is not listed. You will need to process a separate action for their CEC. They cannot approve their own action.
     + Delete the entire row of all employees that should not be uploaded at this time. Ensure that your sorting, etc. does not impact the remainder of the spreadsheet.
     + Ensure no employee that is being uploaded is not eligible (entrance probation, non-classified within six months, does not achieve appraisal, term pending or ineligible board members, etc.).
     + Highlight all deviations from the approved plan in the UPLOAD sheet in yellow. This will allow DFM to audit appropriately. Remember to submit your plan if there is a significant change to your reversions.
     + Ensure that all pay rates listed are only 2 decimal places and no $ sign.
     + Remove any filters and formulas prior to uploading the spreadsheet to the ticket.
     + Graphical user interface, text, application

       AI-generated content may be incorrect.
     + No data should be changed besides pay rate and reason code or deleting rows if necessary (this includes the work assignment number and position number). These columns are highlighted.
     + Ensure that IT – Engineering or Nursing – Healthcare salary structure employees have their highest final rate on the second line (bottom line from the top) if this is listed backwards, the employee’s final rate will not be correct.
8. **Process Completed Spreadsheet (Systems and Data Team)**
   * Log the receipt date in the tracking spreadsheet.
   * Verify that agency finance is **not** listed.
     + If listed, provide an appropriate response to remove.
     + You will enter these individuals as pay rate changes because they cannot approve their own pay increase.
   * **For DHR Requests:**
     + Finance and HR approvers **must not** be listed.
     + You will enter these individuals as pay rate changes because they cannot approve their own pay increase.
   * **For DFM Requests:**
     + Finance and DFM approvers **must not** be listed.
     + You will enter these individuals as pay rate changes because they cannot approve their own pay increase.
9. **Testing in DEM (DEM is a Test environment) (Systems and Data Team)**
   * Log the testing date in the tracking spreadsheet.
   * If errors occur, provide a response.
10. **Add Approvers Post DEM Success (Systems and Data Team)**
    * Once DEM is successful, add approvers to the ticket.
    * Providing a response to indicate approval is needed.
11. **Approval Confirmation (Agency HRO, Agency Finance and DFM)**
    * Ensure all 3 approvals are received.
      + Agency HR must be the HRO.
      + Agency Finance should be listed as an Agency Finance approver in Luma.
    * Record the final approval date in tracking spreadsheet. (Systems and Data Team)
12. **Upload to PRD (Systems and Data Team)**
    * Log the upload date in the tracking spreadsheet.
      + Please note: Uploads may only be processed on certain days due to payroll.
13. **Final Upload and Notification (Systems and Data Team)**
    * Upload the final spreadsheet to the ticket, and the systems and data folder.
    * Notify the agency that the audit can be completed with response.
14. **Audit Completion (Agency HR)**
    * When auditing the data, set your ‘As of Date’ in Luma to 6/8/2025.
    * Things to look out for (if you find these items, comment in ticket for next steps):
      + Employees termed prior to CEC effective date that may have received an increase.
      + If an employee does not show an increase on the right work assignment.
      + Other data overrode or undone.
      + The pay rate is not correct.
    * The Agency HR Approver must provide confirmation in the ticket that the audit is complete.
    * Log the audit completion date on tracking spreadsheet. (Systems and Data Team)
15. **Close Request (Systems and Data Team)**
    * Ensure close date is recorded in tracking spreadsheet.
16. **Resume Luma Actions (Systems and Data Team notifies Agency HR)**
    * Actions may resume on 6/8/2025 or when your upload is completed whichever is later.

**Who is my HR Support?**

* 120, 180, 181, 187, 189, 194, 220, 501, 503, 520, 523, 525, 905
  + Taryn Ross
* 178, 179, 198, 250, 300, 352
  + Rhamona Grabenstein
* 183, 196, 200, 280, 427, 441, 521
  + Michael Evans
* 199, 215, 245, 360
  + Janelle Mcdonald
* 438, 443, 460, 470
  + Jenny Willis
* 330, 331, 332
  + Bonnie Olay
* 231, 351, 444
  + Bri Watkins
* 177, 900
  + Sara Stowe
* 185, 440
  + Gina Hodge
* 195, 260
  + Crystal Moerles
* 197, 210, 522
  + Sarah Mabey
* 230, 232
  + Ashley Spoerer
* 320, 322
  + Paul Fullerton
* 340, 341
  + Jennifer Quinno-Miller
* 190
  + Donald Giesbrecht
* 240
  + Chrystelle Zimmerman
* 270
  + Keri Norton
* 285
  + Jenn Pierce
* 290
  + Holly Bailey
* 511
  + Vikki Swift-Raymond

**Question and Answers from CEC ISD Office Hours**

**📌 General Overview**

**Q: What is the purpose of this meeting?**  
A: To review the FY26 CEC ISD upload process, timelines, responsibilities, and to answer questions from agencies.

**Q: When did the CEC process begin and when does it need to be completed?**  
A: It started on **May 19**, and **all uploads must be completed by June 13**. Timeline available in document.

**Q: What is the effective date for the CEC increase?**  
A: **June 8, 2025**

**Q: When will employees see the increase on their paycheck?**  
A: **July 3, 2025**

**✅ Submitting CEC ISD Requests**

**Q: Who should submit the CEC ISD request to DHR Luma Support?**  
**A:** The request should be submitted by agency HR staff. The HR Officer (HRO) will serve as the approver. Think of this process like any other Luma action, following the standard workflow associated with personnel transactions.

**Q: How should the request be submitted?**  
A: Through a DHR Luma ticket with the subject: CEC ISD Request for [Agency Number]. Include approvers (HR Officer, Finance, and DFM) in the ticket.

**Q: What should I keep in mind when adding people to the watch list of a ticket?**  
A: If you are adding individuals to the watch list, make sure to select the correct person. We have multiple employees with the same name and selecting the wrong one can cause confusion and unintentionally share data with someone not involved in the process.

**Q: What happens after submission?**  
A: You will receive a spreadsheet (template), upload data will be tested, then you'll be asked to approve. Once approved, it will be uploaded to production.

**🧾 Template & Upload Process**

**Q: What data do we enter in the spreadsheet?**  
A: Only fill in:

* + **New Pay Rate** (2 decimal max, no $ or formulas when submitted)
  + **Reason Code** (CEC Merit Increase or CEC Distribution).
* DO NOT change any other data.

**Q: What if an employee completes probation or terminates after the data is pulled?**  
A: **Probation Completion:** Employees who complete probation after the data is pulled will still receive the CEC through the ISD upload like any other employee. The "Probation" column on the spreadsheet is provided as a reference only and will not be used to re-upload data into Luma.

**Terminations:** Employees who terminate after the data is pulled must be manually removed from the spreadsheet or flagged for follow-up and discussion.

**Q: Can employees appear more than once on the spreadsheet?**  
**A:** Yes, but only for employees in the **IT/Engineering Salary Structure** or **Nursing/Healthcare Salary Structure**. These employees in most cases should have **two lines of data**, and the Systems and Data team will provide those lines. **Please verify your data carefully.** For all other employees, include only **one line** per person using the **final pay rate** that reflects all applicable increases. Refer to the guidance document for specific details.

**Q: What if an employee who should have two lines only has one?**  
**A:** Submit a note in your ticket to the Systems and Data team so they can review and make any necessary corrections.

**Q: What if actions (e.g., promotions, terminations) happen after the data is pulled?**  
A: Coordinate carefully. Pull data only after necessary actions are complete to avoid overlap/missing changes.

**Q: Why do some employees appear on multiple lines in the plan spreadsheets submitted in April?**  
A: If an employee was split across multiple fund strings, they had multiple lines because DFM required that level of detail for reversion purposes on the plan spreadsheets submitted in April.

**Q: What does each line on the ISD spreadsheet represent?**  
A: Think of each line representing a separate Luma action to update an employee’s final rate of pay. These actions do not impact funding strings.

**Q: Do ISD actions affect an employee’s funding string?**  
A: No. ISD actions are only about the final rate of pay. Funding is handled separately by each agency and is not reflected in the ISD.

**Q: How do agencies handle funding for employees?**  
A: Some agencies tie funding to the position, while others use positive time reporting in WFM. This varies by agency and does not impact the ISD spreadsheet.

**Q: What’s the recommendation for using XLOOKUP on the plan spreadsheets when employees have multiple lines from the plan spreadsheet?**  
A: A recommendation is to use a pivot table to combine multiple lines into one per employee before running the XLOOKUP.

**🗓️ Deadlines & Timing**

**Q: When is the absolute last day to submit the spreadsheet?**  
A: Uploads must be complete by June 13, but spreadsheets should be submitted by June 6 to allow time for testing and approvals.

**Q: What if we're not ready early?**  
A: That's okay, but do not wait until the final week without Bureau Chief approval. Spacing out submissions helps prevent system issues.

**🔍 Review & Audit**

**Q: What happens after the upload is approved?**  
A: You will audit the records in Luma. If anything is wrong or changed post-approval, submit a follow-up ticket for guidance.

**Q: How can I preview future CEC changes in Luma?**  
A: Use the “Set As of Date” feature to see actions effective June 8.

**🧠 Other Clarifications**

**Q: What if an employee receives both merit and market-based increases?**   
A: For IT/Engineering Salary Structure employees and Nursing/Healthcare Salary Structure employees you will need to enter two lines of data. The Systems and Data team will provide two lines for those employees in those Salary Structures. Please see the guidance for more details. For all other employees it should be the single final pay rate on the spreadsheet.

**Q: How will Director pay be handled?**  
A: DHR will process Director increase and will communicate with HRO’s on this processing. They will be removed from agency spreadsheets.

**Q: What if our HRO is out and cannot approve?**  
A: Work with your Bureau Chief or contact DHR to designate another approver.

**Q: Are there reporting implications based on reason codes?**  
A: This is still under discussion—DHR will follow up with clarified reporting guidance for tracking merit vs. market increases.

**🆘 Support and Resources**

* Use the [DHR CEC page](https://dhr.idaho.gov/) under “State Employee Compensation” for guidance and updates.
* A **Scribe guide** and **cheat sheet** are available.
* Reach out to the DHR Systems and Data team with questions or for individualized timing help.

**CEC Meeting Summary 5/28/2025**

**🗓️ Timeline & Key Dates**

* **Effective date for all CEC increases:** June 8, 2025
* **Data submission deadlines:**
  + Last day to submit your spreadsheet for testing & approvals: June 6, 2025
  + Last day for final “live” upload into Luma: June 13, 2025
* **Recommendation:** Submit as early as possible as waiting until the deadline may overload the team.

**🧾 Template & Upload Process**

* **Template delivery:**
  + Request via ticket; templates generally returned within 24 hours (often same or next day) may be a delay depending on ticket queue.
* **Upload tab:**
  + **Agency HR fills in:** Reason Code & Final New Pay Rate (highlighted columns).
  + **Systems and Data Team fills in:** Effective Date, Action Comments, and other information needed.
  + **Two‐line entries:**
    - For IT & Engineering and Nursing & Healthcare structures the Systems and Data Team will provide two rows.
    - **Row 2 must contain the highest (final) rate,** so the higher pay rate is reflected in Luma.
    - **Line-items**: please notify Systems and Data Team of any line items in notes of ticket so we can provide two lines if needed for these items.
      * Payline exceptions are outside of this process, see below.
  + **Deletions:** Remove any employees not eligible for CEC (e.g. temps, “Do Not Increase” cases) and note in your ticket.
  + **Formulas:** If you use formulas to calculate new rates, **copy → Paste as Values**, and limit pay rate column to two decimal places.

**🧠 Pay-Line Moves & Legislative Increases**

* **Pay‐line moves** (e.g. market adjustments, merit increases) are **not** handled via the CEC ISD load; they must be entered **after** your CEC load as individual actions.
  + These are not line-items.
* **Legislative increases** (e.g. trade‐inspector baseline bumps) are processed:
  + Either as a **separate ISD load** before CEC,
  + Or combined into the two‐line format if a Line-Item (legislative line 1, CEC line 2) so that the CEC rate remains higher.

**🧾 Ticketing & Approval Process**

1. **Agency HR** submits the ticket (not the HRO/fiscal)—streamlines communications.
2. **Systems & Data Team** attaches your template.
3. **Agency HR** returns the completed template.
4. **Testing** in the non-production environment; resolve any formatting or data issues.
5. **Approvals** approvers are re-added to the ticket once the spreadsheet is final:
   * Agency HRO
   * Agency Finance
   * DFM
     + (Bureau chiefs are **not** approving this year.)
6. **Live upload** on pre-approved days – Systems and Data Team
7. **Post-upload Audit** you set your “as-of” date in Luma (June 8) to audit the results.
8. **Closure:** Agency HRO confirms in the ticket that everything is correct, highlight any plan variations (e.g. terminations, special cases) for DFM.

**📌 Communication & Timing**

* **Letters to employees:**
  + You may issue notification letters once your DFM plan is approved or during the upload approval process—**before** the rate appears in Luma (employees can change their own “as-of” date to view early).
* **Transparent Idaho posting:**
  + Question raised about when CEC adjustments appear on Transparent Idaho; team will confirm and provide update.

**🔍 Common Q&A Highlights**

* **Multiple fund distributions:** Use the updated scribe’s XLOOKUP instructions to consolidate into one line for the ISD load.
* **Non-CEC increases (market, merit, payline moves):** Handled separately; they do not go on the CEC upload.

**✅ Next Steps for Agencies**

1. Coordinate with your DHR POC to submit tickets and track templates.
2. Review the updated scribe (with XLOOKUP guidance) for complex fund distributions.
3. Begin preparing your spreadsheets—reach out via ticket with any questions.
4. Watch for the Transparent Idaho update on when increases can be seen.

**CEC Meeting Summary 6/04/2025**

**🧾 Audit Process Overview**

* Agencies must **set their “As Of” date to 6/8/2025** in Luma to audit uploaded data.
  + To do this from any role in Luma click “More” in the bottom left > Set “As of Date” > Enter “6/8/2025” and click “OK”.
    - You will see a red banner at the top notifying you that you are viewing as of that date: A picture containing text

      AI-generated content may be incorrect.
    - Note: be sure to click OK instead of hitting the Enter button.
    - Make sure you close out of the As of Date prior to resuming Luma transactions. To close the As of Date, click the “X” on the red banner when done.
* Use **Employee Roster** report filtered by org unit to verify employees’ final pay rates match submitted CEC templates.
  + From Luma > Generalist > Reports > Employee > Roster > Click the search icon in the Organization Unit field > Select all org units for your supported agency > Click “Ok” > Click Search
    - You can either compare this to our final upload spreadsheet or export it and compare it to the spreadsheet.
* HR must note in the ticket that the audit is complete and flag any discrepancies.

**✅ CEC ISD Upload Process**

* **HR staff** (not HRO/fiscal) must initiate the DHR Luma ticket and manage spreadsheet submissions.
  + This is meant to mimic the workflow approval for actions in Luma. For example, HR Staff are entering a change pay rate action in Luma, and HRO/fiscal staff are clicking the approve button.
* For DHR Supported agencies > DHR Luma Request
  + **Short description:** CEC ISD Request for Agency XXX
  + **Description:** HRO: NAME, Agency Finance: Name, DFM: Name
    - These employees should be approvers in Luma in the Agency HR, Agency Finance and DFM approver groups.
  + **Watchlist:** leave this blank, we will add the approvers mentioned above once all testing is complete and the template is ready for approvals.
* **Only HR should manage and upload the spreadsheet**; changes post-submission are not allowed for audit integrity.
* **Approvers include:** HRO, Agency Finance, and DFM — no approvers should appear on the spreadsheet to avoid conflict of interest.
  + Bureau Chiefs are not approving this year.

**🧾 Template Handling**

* Two fields must be completed by agencies:
  + **Reason Code** (CEC Merit Increase or CEC Distribution)
  + **Final New Pay Rate** (total, not just the increase)
* No formulas: use only values rounded to **two decimal places**.
* **IT/Engineering** and **Nursing/Healthcare** employees receive **two lines**; the **bottom row must contain the highest pay rate**.
* **Line items** (if applicable) employees receive **two lines**; the **bottom row must contain the highest pay rate**.
  + Line items must be called out in the ticket when requesting the template, so we know which employees need two lines.
* Directors are handled separately and are being removed from templates by the Systems and Data team.
* **Pay-line moves** cannot be on the ISD upload and should be submitted after your upload is audited and after the effective date in Luma.

**🔍 Special Cases & Edits**

* **Terminated employees** should be deleted from the spreadsheet and notated in the ticket.
* **Probation flags** should not be changed manually; note discrepancies in the ticket for DFM.
* **Line items** (e.g. for temp staff) must be labeled as CEC Distribution and explained in the ticket.

**🗓️ Key Deadlines**

* **June 4:** Last day to request template (extensions allowed only with Bureau Chief approval).
* **June 6:** Suggested date to submit spreadsheets.
* **June 12 (by 4:29 PM):** Final upload deadline. No uploads on June 13.
  + This is being corrected on the guide as we cannot upload on June 13th due to payroll processing.
* Agencies are advised to **submit well in advance** to allow time for testing and approvals.

**🧾 Final Upload & Ticket Closure**

* Once approved, the ISD team uploads to production on designated days.
* Agencies must **audit post-upload** using the “As of Date” of 6/8/2025 process and confirm ticket closure.

**🆘 Q&A**

**Q: Was how to audit added to the guidance because that is very helpful?**

A: See above on how to set As of Date and find report (for HR employees).

**Q: Is the person who is preparing the spreadsheet allowed to be on the spreadsheet?**

A: The initiator of the ticket, the HRO, Agency Finance Approver and DFM approver, should not be listed on the spreadsheet for auditing purposes.

**Q: HRO asked: I can fill out the upload template with my finance partner, then I will email it to my staff that is handling the ticket to upload, you are just saying that I cannot make changes to the spreadsheet once it’s in the ticket?**

A: Correct, think of the ticket as the person entering the action in Luma, and the approvers are clicking the approve button.

**Q: Our fiscal person who is part of the agency, if she's removed from the spreadsheet what is the mechanism to include her in?**

A: This is a change pay rate action in Luma and can be entered at any time using the same reason codes and effective date.

**Q: Follow up question: Do we need to make a note of that somewhere else that this is not going to match our proposed plan? Also, does this need to be noted for DFM?**

A: No, DFM and others are aware that the approvers are not on the spreadsheets.

**Q: As far as the director’s pay is concerned, we put that we're going to plan for $1.55 an hour. Do we include that? Do we not include that?**

A: No, directors will be processed separately with either the governor’s office, central DHR or potentially Taryn’s team. DFM is aware that the directors are not included. The Systems and Data team are removing directors from spreadsheets.

**Q: If we have a termination, somebody who was in our original workbook but is now terminated. We're not highlighting them on the ISD upload, but we're putting their names in the ticket. Is that correct?**

A: Correct, delete their line from the spreadsheet and notate for DFM.

**Q: If we had a solid sustained as a placeholder, but the actual appraisal rating was an APS, so that changes the number and the ISD load. Are we highlighting that with like a color highlight or we just noting that in the ticket?**

A: Highlight yellow for DFM and notate in the ticket.

**Q: Quick question on the timeline. So, because I think I heard that there was a deadline to request the ticket by today, do we have until the 13th to upload the final and complete spreadsheet?**

A: We found a typo, we cannot upload on the 13th at all due to payroll processing, so the deadline is June 12th at 4:29 pm. This will be updated on the guidance. Please don't wait till the last second because we do have approvals and tests to do, so that can set us back quite a bit.

**Q: For those with two lines, do we need to change the second line beginning rate?**

A: No, that rate is not uploaded at all, we just need the two separate end rates, highest on the bottom/second line.

**Q: Question is about the nursing staff, it's $1.55 or 3%, but that doesn't necessarily show visibility into what their merit rating was. Are we supposed to do the merit as $1.05 and then the remaining amount as their distribution or do we put the merit as $1.55 and what if 3% is higher?**

A: They're going to get the $1.05 - $1.55 if they don't get at least a 3% increase. Then they get the additional, so you may or may not fill out the second line on nursing.

**Q: My question is like their merit is $1.05 but they must get $1.55 as a minimum. So, do I put the extra $0.50 in the CEC distribution to get them to $1.55? And if they are at the 3%, let's say that it's $1.05 for their merit. And to get to 3%, it's another dollar. I put that dollar in the CEC distribution?**

A: Correct, the merit is first and then whatever is extra on the second line.

**Q: Will there be multiple lines for individuals who have an acting appointment to active work assignments?**

A: Yes, and you might want to call that out in your ticket for DFM to be aware.

**Q: So, the template's going to come over for two lines with anybody that's on the Nursing - Healthcare structure or the IT – Engineering structure?**

A: Correct, if their job is in one of those structures we will provide two lines for that employee.

**Q: Follow up:** If they only need one, do I delete the other one?

A: Yes.

**Q: Are you providing a list of staff that are approvers to HR so that our increases get entered.**

A: No, DHR is aware that those are separate change pay rates.

**Q: You said it's OK to delete terminated employees, correct? Just note in there that who's been terminated?**

A: Correct.

**Q: Somebody brand new who's not eligible for CEC can be deleted as well?**

A: Correct and notate in ticket.

**Q: If somebody is showing that they're on entrance probation but they're not, can that be deleted and then highlighted and noted?**

A: No, please do not do anything in those columns, only notate in the ticket. Also, if someone is showing on probation and they should not be, please ensure that their work assignment is accurate with HR.