Salary Planning Procedures
User Guide

Faculty and Staff
2012

The Salary Planning process allows the Schools and Administrative Units to enter data directly into HRIS: annual merit increases, reappointments, and promotions for faculty and staff.

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Important Dates

Data Entry for Faculty: April 16 to May 11
Data Entry for Staff: May 21 to June 22
Data Entry for Medical School Faculty: May 1 to June 4
Deadline to submit competed staff performance evaluations: May 29
Department access changed to Look-Up only for Faculty: May 29
Department access changed to Look-Up only for Staff: July 85
FSM’s Salary parameters/data entry begin for Non-NMFF: April 18
FSM’s Deadline for salary entry for Non-NMFF: May 14
FSM’s Salary parameters/data entry begin for NMFF: May 1
FSM’s Deadline for salary entry for NMFF: June 4
FSM’s Salary parameters/data entry begins for RES & REF: May 14
FSM’s Deadline for salary entry for RES & REF: June 15
Merit Increase loads into HRIS: August 1 an 8
How to Sign on to FASIS
Use the following URL to sign on to FASIS: [http://hrweb.northwestern.edu/](http://hrweb.northwestern.edu/)

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Open your browser</td>
</tr>
<tr>
<td>2.</td>
<td>Type <a href="http://hrweb.northwestern.edu/">http://hrweb.northwestern.edu/</a> into your browser</td>
</tr>
<tr>
<td>3.</td>
<td>Enter your <strong>User ID</strong> and <strong>Password</strong>. The User ID and Password fields are case-sensitive.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the yellow <strong>Sign In</strong> button</td>
</tr>
</tbody>
</table>

---

Welcome to the Northwestern University
**Faculty and Staff Information System**

- FASIS 9.1 Production Database
- FASIS 9.1 Reporting Database

You are now connecting to Northwestern University’s private network, the use of which is intended solely for authorized individuals. Unauthorized access and/or use of this system will be prosecuted to the fullest extent of the law.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>This is the FASIS Home Page.</td>
</tr>
<tr>
<td>6.</td>
<td>Save the FASIS URL as a Favorite Item in the browser. To do this, Click Favorites from the browser tool bar. Click Add to Favorites and then click OK.</td>
</tr>
</tbody>
</table>
### To Access Salary Planning Panels

#### Step 1

When logging into HRIS, the system will bring you to the **Home** page.

To view the Salary Planning panels, use the following navigation:

- From the Home page:
  - Compensation
  - Base Compensation
  - Merit Increases

#### Step 2

Within the **Merit Increase** panel, choose the panel that you wish to view:
- SAU Change
- Merit by Employee-Staff
- Merit by SAU-Staff
- Merit by Employee-Faculty
- Merit by Emp Faculty - Med
- Merit by SAU-Faculty
- Reappointment Faculty
- Promotion Faculty
- Multi Appointment Faculty
- Salary Adjustment - Faculty
Salary Adjustment - Faculty

Your menu choices will depend on what groups you administer.
Viewing Information

How to Find an SAU for an Employee

An SAU for an employee is stored at the position level. If you wish to look up the SAU for an employee, you will first need to know the employee’s position number. Once you have the employee’s position number, you will use it to retrieve the SAU from the Position Data panel.

Step 1

To view an employee, from Home:
- Workforce Administration
- Job Information
- Job Data

Step 2

A dialog box will appear.

You can search for an employee by entering either the Employee ID, Name, or Last Name of employee.

Under employee Last Name, type in and hit Enter.
Step 3

Click on the desired name and the system will bring you into Work Location tab.

![Work Location tab screenshot]

Step 4

Write down the Position Number. You will use it to access information on the Position panels.

Step 5

Navigate to position panels
- Organizational Development
- Position Management
- Add/Maintain Positions
- Position Data

At Search panel enter Position number for desired job.

![Position Data search panel screenshot]
Step 6

Navigate to *NW Position Data* tab.

Once you are in the *NW Position Data* panel, locate the *Salary Admin Unit* field.

If an employee has not been assigned to an SAU, the *Salary Admin Unit* field will be blank.
The capability to download data into Excel exists for all Salary Planning panels that contain grids. The following Salary Panels contain grids:

- Merit by SAU - Faculty & Staff
- Reappointment – Faculty
- Promotion – Faculty
- Multi-Appointment – Faculty
- Salary Adjustment – Faculty

From any of the Grid panels, click the Grid Icon to download the entered data into an Excel document.

Once the grid icon is clicked, a new window will appear on your screen. You may then click File, Save As to save to your workstation.

* If using a Windows XP machine, you may have to hold the “Ctrl” key down while clicking on the grid icon.

Click the browser close button when you are finished viewing the Excel document.
Other Grid Features

The capability to sort and find data within the Salary Planning grid-like panels also exists in HRIS. The following Salary Panels contain grids:

- Merit by SAU - Faculty & Staff
- Reappointment – Faculty
- Promotion – Faculty
- Multi-Appointment – Faculty
- Salary Adjustment – Faculty

Sort Data

Click any of the column heading links to sort by that particular field.

For example, to sort alphabetically by name, click the Column Header called “Name”

Or to sort by emplid, click the ID column header.
**Find Employees within a Grid**

Click Find link located on the Grid scroll bar to locate an email within your grid.

This is useful if you have long list of employees with the same SAU.

Then enter the person’s last name or employee ID into the User Prompt and click Ok.

Your cursor will move to the employee’s row within the panel.

**View all employees on one page**

Click the View All link located on the grid scroll bar to view all employees on one page.
### HRIS Salary Planning Approval Codes

<table>
<thead>
<tr>
<th>Code</th>
<th>Department</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>Planning</td>
<td>Entry has taken place</td>
</tr>
<tr>
<td>D</td>
<td>Department</td>
<td>Department Level Approval</td>
</tr>
<tr>
<td>S</td>
<td>School</td>
<td>School Level Approval</td>
</tr>
<tr>
<td>E</td>
<td>Evaluation Only</td>
<td>Merit not granted to entire SAU based upon economical situation. Performance Evaluation is entered.</td>
</tr>
<tr>
<td>N</td>
<td>No Entry</td>
<td>Employee will not receive merit increase – <em>typically used when the employee is leaving the University before September 1</em></td>
</tr>
<tr>
<td>R</td>
<td>Rejected</td>
<td>Merit must be re-evaluated</td>
</tr>
<tr>
<td>Z</td>
<td>Zero</td>
<td>Merit not granted based upon performance (used only for Staff Salary Planning)</td>
</tr>
<tr>
<td>A</td>
<td>Administration</td>
<td>Final Approval - Used only by Provost, Compensation and Medical Administration</td>
</tr>
</tbody>
</table>
SAU Change Page - Available for Faculty SAU Changes

Please note: Staff SAU changes are made by Compensation and Medical Faculty changes are made by Medical Administration.

*Main Menu / Compensation / Base Compensation / Merit Increases / SAU Change*

The *SAU Change* page is used when adding, deleting, or changing a Salary Administration Unit (SAU). Only the *New SAU* field is available for data entry.

<table>
<thead>
<tr>
<th>SAU</th>
<th>Department grouping used for salary planning purposes - current Salary Administration Unit.</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Rc#</em></td>
<td>Indicates which job</td>
</tr>
<tr>
<td><em>Posn#</em></td>
<td>Position number</td>
</tr>
<tr>
<td><em>Job Cd</em></td>
<td>6-digit code assigned by Compensation that identifies the Job Title</td>
</tr>
<tr>
<td><em>Job Title</em></td>
<td>Job title</td>
</tr>
<tr>
<td><em>Paygrp</em></td>
<td>Pay group - BIR, MON or MOF</td>
</tr>
<tr>
<td><em>Dept ID</em></td>
<td>6-digit code that identifies the department</td>
</tr>
<tr>
<td><em>Dept Name</em></td>
<td>Name of the department</td>
</tr>
</tbody>
</table>

*New SAU*: Ability to add, change or delete SAU for an employee

**shaded** = data entry field, all others are calculated fields and display only
Merit by Employee - Staff Page

Main Menu / Compensation / Base Compensation / Merit Increases / Merit by Employee - Staff

This page lists all Merit Increase, Market Allocation, and Reappointment information about a particular staff member, and is used to view the data entry done on the Merit by SAU - Staff page. Information about an employee can be viewed by entering the Employee ID or Employee Name. If you want to select Salary Administration Unit and Salary Plan fields instead, all staff members within the same SAU and Salary Plan are brought up alphabetically within the Dialog box. You can then view records one by one.

<table>
<thead>
<tr>
<th>ID</th>
<th>7-digit employee ID number assigned by HRIS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Employee name</td>
</tr>
<tr>
<td>SAU</td>
<td>Department grouping used for salary planning purposes - the Salary Administration Unit</td>
</tr>
<tr>
<td>Sal Pln</td>
<td>Salary groups determined by job code; valid staff salary plans are EXS, EXC, NEX, ITS, and UPD</td>
</tr>
<tr>
<td>Std Hrs</td>
<td>Standard hours worked per week for the position</td>
</tr>
<tr>
<td>Grd</td>
<td>2-digit Pay Grade for the position</td>
</tr>
<tr>
<td>Rc#</td>
<td>Indicates which job</td>
</tr>
</tbody>
</table>
**Dept ID** 6-digit code that identifies the department

**Dept Name** Name of the department

**Posn End Date** Indicates end date of the position - if the position has an indefinite end, this field will be blank.

**Indefinite End** If the position has an indefinite end, this field will be checked

**Posn #** Position number

**Posn Type** Code that describes the kind of position – STF

**Posn Cat** Categorization of the position, i.e. kind of staff, EXS or NEX

**New Posn End Dt** Use the New Posn End Dt field to extend the end date on the position. The position end date must be equal or greater than the current or New Appointment End Date.

**New Posn Indef End** Use the New Posn Indef End field to extend the end date of the position indefinitely. If the appointment is indefinite the position must have an indefinite end.

shaded = data entry field, all others are calculated fields and display only
**Merit Increase Fields**

**Merit Appr**
Enter current approval level for the Merit Increase request. Select D - Departments, N - No Entry, P - Planning, R - Rejected, or S - School.

**Eval**
Use the *Eval* field to enter performance evaluation for staff employees. Ranking may be no less than 1 and no greater than 5, followed by two decimal points - X.XX.

Those departments involved in the evaluation pilot program will be allowed to enter a number between 1 and 7.

**Comment**
Use the *Comment* field to note additional information for Compensation. This field has a 30-character maximum.

**Pct Incr**
Use the *Pct Incr* to enter the percent of proposed increase at a monthly/hourly rate; When a *Pct Incr* for the employee is entered, the *New Annl Rt*, *New Comp Rt*, and *$ Incr* will automatically calculate based on the new value entered in *Pct Incr*.

*shaded = data entry field*, all others are calculated fields and display only
$ Incr

Use the $ Incr to enter the monthly/hourly dollar amount of the proposed increase. Monthly amounts are entered for monthly staff; hourly amount entered for biweekly staff. When a new $ Incr for the employee is entered, the New Annl Rate, New Comp Rt and Pct Incr will automatically calculate based on the new value entered in $ Incr.

Comp Rt

Current hourly/monthly compensation rate

New Comp Rt

Use the New Comp Rt to enter the proposed new hourly/monthly compensation rate. When New Comp Rt for the employee is entered, the New Annl Rt, Pct Incr, and $ Incr will automatically calculate based on the new value entered in New Comp Rt.

Chg Amt

| $ Incr | $ Incr |
Annl Rt

Bi-weekly staff = hourly rate \times scheduled hours \times 2 \times scheduled pay periods
Monthly staff = monthly compensation rate \times 12

New Annl Rt

Use the NW Annl Rt to enter the proposed New Annl Rt. When a New Annl Rt for the employee is entered, the New Comp Rt, Pct Inc, and $ Incr will automatically calculate based on the new value entered in New Annl Rt.

CompRatio

Calculated field which shows how close the New Comp Rt is to the new midpoint for that salary grade. CompRatio is the new hourly/monthly compensation rate divided by the midpoint of salary grade.

shaded = data entry field, all others are calculated fields and display only
### Current Full-Time Equivalent Salary for the job.

**Bi-weekly staff** = hourly rate x 75 x 26.1

**Monthly staff** = monthly compensation rate x 12 divided by percent full time

### New Full-Time Equivalent Salary for the job.

**Bi-weekly staff** = new hourly rate x 75 x 26.1

**Monthly staff** = new monthly compensation rate x 12 divided by percent full time
**Reappointment Fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appt End Dt / Indef End</td>
<td>Current appointment end date / current appointment indefinite end</td>
</tr>
<tr>
<td>Reap Appr</td>
<td>Enter current approval level for the reappointment request. Select P – Planning, D - Departments, N - No Entry, R - Rejected, or S - School.</td>
</tr>
<tr>
<td>New Appt End</td>
<td>Use the New Appt End to enter new appointment end date. You may have to extend the position end date as well, since position end date must be equal to or greater than the appointment end date.</td>
</tr>
<tr>
<td>New Indef End</td>
<td>Check the box if appointment has indefinite end. The position end date must be indefinite if appointment end date is made indefinite.</td>
</tr>
</tbody>
</table>

**Promotion Fields**

Not used for Staff Salary Planning process.

*shaded = data entry field*, all others are calculated fields and display only
### Merit by SAU -- Staff Page

**Main Menu / Compensation / Base Compensation / Merit Increases / Merit by SAU - Staff**

The Merit by SAU - Staff page is used to enter Merit Increase and Market Allocation information for an entire Salary Administration Unit. All individuals with the same SAU and Salary Plan can be viewed within this page.

<table>
<thead>
<tr>
<th><strong>SAU</strong></th>
<th>Department grouping used for salary planning purposes - current Salary Administration Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sal Pln</strong></td>
<td>Salary groups determined by job code; valid staff salary plans are EXS, NEX, ITS, UPD, and EXC</td>
</tr>
<tr>
<td><strong>Goal Merit Increase %</strong></td>
<td>Proposed percentage increase to be given to the SAU and Salary Administration plan</td>
</tr>
<tr>
<td><strong>Goal Merit Increase $</strong></td>
<td>Proposed sum of Dollar amount that can be distributed to employees within a SAU. See calculation below: Goal Merit Inc $ = total current salaries multiplied by Goal Merit % Increase.</td>
</tr>
<tr>
<td><strong>Total Merit Increase %</strong></td>
<td>Percent increase of all employees combined within a SAU, after merit increase entry.</td>
</tr>
<tr>
<td><strong>Total Merit Increase $</strong></td>
<td>Sum of all dollar amount increases given to employees within a SAU (after merit increase entry).</td>
</tr>
<tr>
<td><strong>Total Merit Comparatio</strong></td>
<td>SAU comp ratio. Used to determine if a SAU is eligible for Market Allocation or not. See Market Allocation section.</td>
</tr>
<tr>
<td><strong>Goal Market Allocation Amt</strong></td>
<td>Goal Market Allocation Percent multiplied by total current salaries.</td>
</tr>
<tr>
<td><strong>Total Market Allocation Pct</strong></td>
<td>Total Market Allocation Amount increase divided by Total Current Salaries</td>
</tr>
<tr>
<td><strong>Total Market Allocation Amt</strong></td>
<td>Total Increase amount subtracted by total merit increase amount</td>
</tr>
</tbody>
</table>
**Merit Appr**
Enter current approval level for the reappointment request. Select P – Planning, D - Departments, N - No Entry, R - Rejected, or S – School, Z – Zero (based upon performance).

**ID**
7-digit employee ID number assigned by HRIS

**Name**
Employee name

**Rc#**
Record number; indicates which job

**Dept ID**
6-digit code that identifies the department

**Grd**
2-digit Pay Grade for the position

**Eval**
Use the Eval field to enter performance evaluation for staff employees. Ranking may be no less than 1 and no greater than 5, followed by two decimal points - X.XX

Those departments involved in the evaluation pilot program will be allowed to enter a number between 1 and 7.

**shaded = data entry field**, all others are calculated fields and display only
### Comp Rt
Current hourly/monthly compensation rate

### Annl Rt
- Bi-weekly staff = hourly rate x scheduled hours x 2 x scheduled pay periods
- Monthly staff = monthly compensation rate x 12

### Pct Incr
Use the Pct Incr to enter the percent of the proposed increase at a monthly/hourly rate. When a Pct Incr for the employee is entered, the New Annl Rt, New Comp Rt, and $ Incr will automatically calculate based on the new value entered in Pct Incr.

### $ Incr
Use the $ Incr to enter the monthly/hourly dollar amount of the proposed increase. Monthly amounts are entered for monthly staff, hourly amount entered for biweekly staff. When a new $ Incr for the employee is entered, the New Annl Rt, New Comp Rt and Pct Incr will automatically calculate based on the new value entered in $ Incr.
<table>
<thead>
<tr>
<th><strong>Chg Amt</strong></th>
<th><strong>$ Incr</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Comp Rt</strong></td>
<td>Use the <em>NW Comp Rt</em> to enter the proposed new hourly/monthly compensation rate. When a <em>New Comp Rt</em> for the employee is entered, the <em>New Annl Rt</em>, <em>Pct Increase</em>, and <em>$ Incr</em> will automatically calculate based on the new value entered in <em>New Comp Rt</em>.</td>
</tr>
</tbody>
</table>
| **New Annl Rt** | Use *NW Annl Rt* to enter the proposed *New Annl Rt*. When a *New Annl Rt* for the employee is entered, the *New Comp Rt*, *Pct Increase*, and *$ Incr* will automatically calculate based on the new value entered in *New Annl Rt* - see calculations in *Annl Rt*.  
Bi-weekly staff - new hourly rate x scheduled hours x 2 x scheduled pay periods 
Monthly staff - new monthly compensation rate x 12 |
| **CompRatio** | Calculated field - which shows how close the *New Comp Rt* is to the new midpoint for that salary grade. New hourly/monthly compensation rate divided by the midpoint of salary grade |

*shaded = data entry field*, all others are calculated fields and display only
**FTE Sal**

Current Full-Time Equivalent Salary for the job:

Bi-weekly staff = hourly rate x 75 x 26.1

Monthly staff = mthly compensation rate x 12 / PFT

**New FTE Sal**

New Full-Time Equivalent Salary for the job:

Bi-weekly staff = new hourly rate x 75 x 26.1

Monthly staff = new mthly compensation rate x 12 / PFT

**Dept Name**

Name of the department

**Std Hrs**

Standard hours worked per week for the positions

**Job Cd**

6-digit code assigned by compensation that identifies the Job Title

**Job Title**

Job title
Merit by Employee - Faculty Page

Main Menu / Compensation / Base Compensation / Merit Increases / Merit by Employee - Faculty

This page lists all Merit Increase, Reappointment and Promotion information about a particular faculty member and is used to verify the data entry done on the Merit by SAU - Faculty page. Information about an individual employee can be viewed by entering the Employee ID or Employee Name in the dialog box. If the NW Salary Admin Unit and Salary Administration Plan fields are used instead, all faculty members within the same SAU (NW Salary Admin Unit) & Salary Plan (Salary Administration Plan) are brought up alphabetically within the dialog box.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>7-digit employee ID number assigned by HRIS</td>
</tr>
<tr>
<td>Name</td>
<td>Employee name</td>
</tr>
<tr>
<td>SAU</td>
<td>Department grouping used for salary planning purposes - the Salary Administration Unit</td>
</tr>
<tr>
<td>Sal Pln</td>
<td>Salary plan groups determined by job code, valid staff salary plans are FAC, ACS, and LIB</td>
</tr>
<tr>
<td>Std Hrs</td>
<td>Standard hours worked per week for the position</td>
</tr>
<tr>
<td>Grd</td>
<td>2-digit Pay Grade for the position</td>
</tr>
<tr>
<td>Rc #</td>
<td>Record number; indicates which job</td>
</tr>
</tbody>
</table>
### Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Dept ID</strong></td>
<td>6-digit code that identifies the department</td>
</tr>
<tr>
<td><strong>Dept Name</strong></td>
<td>Name of the department</td>
</tr>
<tr>
<td><strong>Posn End Date</strong></td>
<td>End date of the position - if the position has an indefinite end, this field will be blank</td>
</tr>
<tr>
<td><strong>Posn Indef End</strong></td>
<td>Field will be checked if position has an indefinite end</td>
</tr>
<tr>
<td><strong>Posn#</strong></td>
<td>Position number</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Code that describes the kind of position - i.e. FAC</td>
</tr>
<tr>
<td><strong>Catg</strong></td>
<td>Categorization of the position, i.e. kind of faculty, REG, etc.</td>
</tr>
<tr>
<td><strong>New Posn End Dt</strong></td>
<td>Use the <em>New Posn End Dt</em> to extend the end date on position. The position end date must be equal or greater than the current or <em>New Appointment End Date</em>.</td>
</tr>
<tr>
<td><strong>New Posn Indef End</strong></td>
<td>Use the <em>New Posn Indef End</em> to extend the end date on the position indefinitely. If the appointment is indefinite the position must have an indefinite end.</td>
</tr>
<tr>
<td><strong>Merit Increase Fields</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td><strong>Merit Appr</strong></td>
<td>Enter current approval level for the reappointment request. Select P – Planning, D - Departments, N - No Entry, R - Rejected, or S – School.</td>
</tr>
<tr>
<td><strong>Comment</strong></td>
<td>Use the Comment field to note additional information for Compensation or Provost. This field has a 30-character maximum.</td>
</tr>
<tr>
<td><strong>Pct Incr</strong></td>
<td>Use the Pct Incr field to enter percent of proposed increase at a monthly rate. When a Pct Incr for the employee is entered, the New Annl Rt, New Comp Rt, and $ Incr will automatically calculate based on the new value entered in Pct Incr.</td>
</tr>
<tr>
<td><strong>$ Incr</strong></td>
<td>Use the $ Incr to enter the monthly dollar amount of the proposed increase. When a new $ Incr for the employee is entered, the New Annl Rt, New Comp Rt and Pct Incr will automatically calculate based on the new value entered in $ Incr.</td>
</tr>
</tbody>
</table>

*shaded = data entry field, all others are calculated fields and display only*
### Comp Rt

Current monthly salary

### New Comp Rt

Use the New Comp Rt to enter the proposed new monthly compensation rate. When a New Comp Rt for the employee is entered, the New Annl Rt, Pct Incr, and $ Incr will automatically calculate based on the new value entered in New Comp Rt.

### Chg Amt

$ Incr

### Annl Rt

Formula - total of the monthly compensation rates for all benefits eligible records x 12

### New Annl Rt

Use the New Annl Rt to enter the proposed New Annl Rt. When a New Annl Rt for the employee is entered, the New Comp Rt, Pct Incr, and $ Incr will automatically calculate based on the new value entered in New Annl Rt.

Faculty - new monthly compensation rate x 12

*shaded = data entry field*, all others are calculated fields and display only
**CompRatio**  
*CompRatio* is a calculated field, which shows how close the New Comp Rt is to the new midpoint for that salary grade. 
New monthly compensation rate / the midpoint of salary grade

**FTE Sal**  
Monthly compensation rate x 12 divided by percent full time

**New FTE Sal**  
Enter new Full-Time Equivalent Salary for the job, 
Faculty = new monthly compensation rate x 12 divided by percent full time

*shaded* = data entry field, all others are calculated fields and display only
Northwestern University
Human Resources Information Systems

Salary Planning Procedures
Panel Definitions

Reappointment Fields

**Appt End Dt**
Current end date for the appointment. If indefinite, this field will be blank and the checkbox *Indef End* will be marked.

**Tenure**
Current tenure status.

**Expected Tenure Date**
Expected date tenure will be reached.

**Reap Approval**

**New Appt End**
Use the *New Appt End* to extend the appointment end date. You may have to extend the position end date, since position end date must be equal or greater than the appointment end date.

**New Indef End**
Use the *New Indef End* if the appointment end date is indefinite. Position must be indefinite if appointment is made indefinite.

**Cont Per**
Number of months during a continuous 12-month period that the faculty member is contracted to work. Two Contract Period fields exist, one pre-populated with the existing period, and one open for data entry of a new period – if necessary. This field is also pre-populated with the existing period but can be adjusted at your discretion.

*shaded* = data entry field, all others are calculated fields and display only.
## Promotion Fields

<table>
<thead>
<tr>
<th><strong>Job Cd</strong></th>
<th>6-digit code assigned by Compensation - identifies Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Title</strong></td>
<td>Job title</td>
</tr>
<tr>
<td><strong>Prom Appr</strong></td>
<td>Enter current approval level for the reappointment request. Select <strong>P</strong> – Planning, <strong>D</strong> – Departments, <strong>N</strong> – No Entry, <strong>R</strong> – Rejected, or <strong>S</strong> – School.</td>
</tr>
<tr>
<td><strong>New Job Cd</strong></td>
<td>Enter the 6-digit code assigned by Compensation that identifies the new Job Title</td>
</tr>
<tr>
<td><strong>New Job Title</strong></td>
<td>New job title</td>
</tr>
</tbody>
</table>

*shaded = data entry field*, all others are calculated fields and display only
Merit by SAU - Faculty Page

Main Menu / Compensation / Base Compensation / Merit Increases / Merit by SAU - Faculty

The Merit by SAU - Faculty page is used to enter faculty merit increases for an entire Salary Administration Unit. All individuals with the same SAU and Salary Plan can be viewed within this page.

SAU
Department grouping used for salary planning purposes - current Salary Administration Unit

Sal Pln
Salary groups determined by job code, valid staff salary plans are FAC, LIB, and ACS

Total Current Salaries
Sum of all current annual salaries for all employees within the same SAU and Salary Plan

Goal Merit Percent Increase
Proposed merit percent increase to be given to employees within a particular SAU and Salary Plan.

Goal Merit Increase Amount
Proposed dollar increase to be given to employees within a particular SAU and Salary Plan. See the calculation below.

Goal Merit Increase Amount = Total Current Salaries multiplied by Goal Merit Percent Increase

Total percent Increase
Percent increase of all employees combined within a SAU, after merit increase entry.

Total Increase Amount
*sum of all dollar amount increases given to employees within a SAU (after merit increase entry).*
### Merit Appr
Enter the current approval level for the merit increase request. Select D - Departments, N - No Entry, P - Planning, R - Rejected, or S - School.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Evanston, Elizabeth</td>
</tr>
<tr>
<td>2</td>
<td>Northwestern, Michael</td>
</tr>
<tr>
<td>3</td>
<td>Shuttle, Sandy</td>
</tr>
<tr>
<td>4</td>
<td>University, Timothy</td>
</tr>
<tr>
<td>5</td>
<td>Beah, Ishmael</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comp Rt</th>
<th>Current monthly salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>105574</td>
<td>8175.60</td>
</tr>
<tr>
<td>100255</td>
<td>11333.33</td>
</tr>
<tr>
<td>101375</td>
<td>7475.60</td>
</tr>
<tr>
<td>1006075</td>
<td>10383.33</td>
</tr>
<tr>
<td>100792</td>
<td>6250.60</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Annl Rt</th>
<th>Annual rate, monthly compensation rate x 12</th>
</tr>
</thead>
<tbody>
<tr>
<td>81100.00</td>
<td></td>
</tr>
<tr>
<td>135999.95</td>
<td></td>
</tr>
<tr>
<td>89790.00</td>
<td></td>
</tr>
<tr>
<td>124599.95</td>
<td></td>
</tr>
<tr>
<td>75000.00</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Pct Incr</th>
<th>Use the ( \text{Pct Incr} ) field to enter the percent of the proposed increase at a monthly/hourly rate. When a ( \text{Pct Incr} ) for the employee is entered, the New Annl Rt, New Comp Rt, and ( \text{Incr} ) will automatically calculate based on the new value entered in ( \text{Pct Incr} ).</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>( \text{Incr} )</th>
<th>Use the ( \text{Incr} ) field to enter the monthly dollar amount of proposed increase. When a new ( \text{Incr} ) for the employee is entered, the New Annl Rt, New Comp Rt and ( \text{Pct Incr} ) will automatically calculate based on the new value entered in ( \text{Incr} ).</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**shaded = data entry field**, all others are calculated fields and display only.
Chg Amt | $ Incr
---|---
New Comp Rt | Use New Comp Rt field to enter the proposed new monthly compensation rate. When a New Comp Rt for the employee is entered, the New Annl Rt, Pct Incr, and $ Incr will automatically calculate based on the new value entered in New Comp Rt.

New Annl Rt | Use New Annl Rt field to enter the proposed New Annl Rt. When a New Annl Rt for the employee is entered, the New Comp Rt, Pct Incr, and $ Incr will automatically calculate based on the new value entered in New Annl Rt.

Faculty - new monthly compensation rate x 12

shaded = data entry field, all others are calculated fields and display only
### FTE Sal
Current monthly compensation rate x 12 divided by percent full time

### New FTE Sal
Enter new Full-Time Equivalent Salary for the job,
Faculty = new monthly compensation rate x 12 divided by percent full time

### Job Cd
6-digit code assigned by Compensation that identifies the Job Title

### Job Title
Job title

### Cont Per
Number of months during a continuous 12-month period that the faculty member is contracted to work

### Grd
2-digit Pay Grade for the position

### Dept Name
Name of the department

### Contract Period
Current contract period for employee

### New Contract Period
Enter new contract period – only enter new number if necessary. This will load with Merit Increase load to Job Data.

<table>
<thead>
<tr>
<th>Pct Incr</th>
<th>$ Incr</th>
<th>Chg Amt</th>
<th>New Corr Rl</th>
<th>New Amt Rl</th>
<th>FTE</th>
<th>New FTE Sal</th>
<th>Percent Full Time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>98</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>136000.00</td>
<td>80.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>89700.00</td>
<td>100.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>124000.00</td>
<td>100.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>75000.00</td>
<td>100.00</td>
<td></td>
</tr>
</tbody>
</table>

*shaded = data entry field*, all others are calculated fields and display only
Reappointment - Faculty page

Main Menu / Compensation / Base Compensation / Merit Increases / Reappointment - Faculty

The Reappointment – Faculty page is used to extend the end date on existing appointments for employees in the FAC, ACS, or LIB salary plans. Only the Reappointment Approval (Reap Appr), New Appt End Dt and New Indef End Dt fields are data enterable.

<table>
<thead>
<tr>
<th>SAU</th>
<th>Department grouping used for salary planning purposes - current Salary Administration Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sal Pln</td>
<td>Salary groups determined by job code, valid staff salary plans are FAC, LIB, and ACS</td>
</tr>
<tr>
<td>Reap Appr</td>
<td>Enter current approval level for the reappointment request. Select P – Planning, D - Departments, N - No Entry, R - Rejected, or S – School.</td>
</tr>
<tr>
<td>ID</td>
<td>7-digit employee ID number assigned by HRIS</td>
</tr>
<tr>
<td>Name</td>
<td>Employee name</td>
</tr>
<tr>
<td>Rc#</td>
<td>Indicates which job</td>
</tr>
<tr>
<td>Dept ID</td>
<td>6-digit code that identifies the department</td>
</tr>
<tr>
<td>Appt End</td>
<td>End date of the appointment. If indefinite end, this field will be blank</td>
</tr>
<tr>
<td>Tenure</td>
<td>Tenure status</td>
</tr>
<tr>
<td>Expected Tenure Begin Date</td>
<td>Date the employee is expected to reach Tenure status</td>
</tr>
</tbody>
</table>

shaded = data entry field, all others are calculated fields and display only
### Indef End
This field will be checked if the appointment end date is indefinite.

### New Appt End
Use the *New Appt End* field to extend the appointment end date. You may have to extend the position end date too, since position end date must be equal or greater than the appointment end date.

### New Indef End
Use the *New Indef End* field to indicate that the appointment has a new indefinite end. The Position end date must be indefinite if appointment is made indefinite.

### Posn End Dt
End date of the position. If the position has an indefinite end, this field will be blank.

### New Posn End Dt
Use the *New Posn End Dt* field to enter a new position end date. The position end date must be equal or greater than the current or *New Appointment End Date*.

### New Posn Indef End
Use the *New Posn Indef End* field to indicate that the position has an indefinite end. If the appointment is indefinite the position must have an indefinite end.

### Posn #
Position number

### Job Title
Job title

*shaded = data entry field*, all others are calculated fields and display only
### Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Cd</strong></td>
<td>6-digit code assigned by Compensation that identifies the Job Title</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Describes the kind of position, i.e. FAC</td>
</tr>
<tr>
<td><strong>Catg</strong></td>
<td>Categorization of the position, i.e. kind of faculty, REG, VIS, etc.</td>
</tr>
<tr>
<td><strong>Cont Per</strong></td>
<td>Number of months during a continuous 12-month period that the employee is contracted to work</td>
</tr>
<tr>
<td><strong>Dept Name</strong></td>
<td>Name of the department</td>
</tr>
</tbody>
</table>

*shaded = data entry field*, all others are calculated fields and display only
Promotion Faculty page

Main Menu / Compensation / Base Compensation / Merit Increases / Promotion - Faculty

The Promotion - Faculty page is used to promote an employee in the FAC, ACS, or LIB salary plans during the Merit Increase process. Only the Promotion Approval (Prom Appr), New Job Cd, and New FTE Sal fields are data enterable.

<table>
<thead>
<tr>
<th>SAU</th>
<th>Department grouping used for salary planning purposes - current Salary Administration Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sal Pln</td>
<td>Salary groups determined by job code, valid staff salary plans are FAC, LIB, and ACS</td>
</tr>
<tr>
<td>Prom Appr</td>
<td>Enter current approval level for the reappointment request. Select P – Planning, D - Departments, N - No Entry, R - Rejected, or S – School.</td>
</tr>
<tr>
<td>ID</td>
<td>7-digit employee ID number assigned by HRIS</td>
</tr>
<tr>
<td>Name</td>
<td>Employee name</td>
</tr>
<tr>
<td>Rc#</td>
<td>Record number, indicates which job</td>
</tr>
<tr>
<td>Dept ID</td>
<td>6-digit code that identifies the department</td>
</tr>
<tr>
<td>Job Cd</td>
<td>6-digit code assigned by Compensation that identifies the Job Title</td>
</tr>
<tr>
<td>Job Title</td>
<td>Job title</td>
</tr>
</tbody>
</table>

shaded = data entry field, all others are calculated fields and display only
New Job Cd | Enter the 6-digit code assigned by Compensation that identifies the new Job Title
---|---
New Job Title | New job title
Comp Rt | Currently monthly salary
Annl Rt | Current annual salary, Monthly compensation rate x 12
Pct Incr | Percent of proposed Merit Increase
$ Incr | Monthly dollar amount of proposed Merit Increase
Change Amount | $ Incr
New Comp Rt | New monthly salary

shaded = data entry field, all others are calculated fields and display only
**New Annl Rt**
New monthly compensation rate x 12

**FTE Sal**
Monthly compensation rate x 12 divided by percent full time

**New FTE Sal**
Enter the New FTE Salary, calculated as New Comp Rt x 12 divided by New Pct FT

**Type**
Code that describes the kind of position, i.e. FAC

**Catg**
Categorization of the position, i.e. kind of faculty, REG, VIS, etc.

**Cont Per**
Number of months during a continuous 12-month period that the employee is contracted to work

**Dept Name**
Name of the department

*shaded = data entry field*, all others are calculated fields and display only.
Multiple Appointment - Faculty Page

Main Menu / Compensation / Base Compensation / Merit Increases / Multi Appointment - Faculty

The *Multiple Appointment - Faculty* page is display only. You may view all appointments for an individual, as long as you have security to view at least one of the employee's Salary Administration Units. This page is used to view faculty members' current salaries from appointments that other departments control.

<table>
<thead>
<tr>
<th>Name</th>
<th>Employee name</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ID</strong></td>
<td>7-digit employee ID number assigned by HRIS</td>
</tr>
<tr>
<td><strong>App</strong></td>
<td>Displays the current approval level for the reappointment request. Select <strong>P</strong> – Planning, <strong>D</strong> - Departments, <strong>N</strong> - No Entry, <strong>R</strong> - Rejected, or <strong>S</strong> – School.</td>
</tr>
<tr>
<td><strong>Rc #</strong></td>
<td>Indicates which job</td>
</tr>
<tr>
<td><strong>Dept ID</strong></td>
<td>6-digit code that identifies the department</td>
</tr>
<tr>
<td><strong>SAU</strong></td>
<td>Department grouping used for salary planning purposes - current Salary Administration Unit</td>
</tr>
<tr>
<td><strong>Sal Pln</strong></td>
<td>Salary groups determined by job code</td>
</tr>
<tr>
<td><strong>Comp Rt</strong></td>
<td>Current monthly salary</td>
</tr>
<tr>
<td><strong>Annl Rt</strong></td>
<td>Compensation rate x 12</td>
</tr>
</tbody>
</table>
### Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pct Incr</strong></td>
<td>Percent of proposed increase</td>
</tr>
<tr>
<td><strong>$ Incr</strong></td>
<td>Monthly dollar amount of proposed increase</td>
</tr>
<tr>
<td><strong>Chg Amt</strong></td>
<td>$ Incr</td>
</tr>
<tr>
<td><strong>New Comp Rt</strong></td>
<td>New monthly salary</td>
</tr>
<tr>
<td><strong>New Annl Rate</strong></td>
<td>New monthly compensation rate x 12</td>
</tr>
<tr>
<td><strong>FTE Sal</strong></td>
<td>Monthly compensation rate x 12 divided by percent full time</td>
</tr>
<tr>
<td><strong>New FTE Sal</strong></td>
<td>New monthly compensation rate x 12 divided by new percent full time</td>
</tr>
<tr>
<td><strong>Job Cd</strong></td>
<td>6-digit code assigned by compensation that identifies the Job Title</td>
</tr>
<tr>
<td><strong>Job Title</strong></td>
<td>Job title</td>
</tr>
<tr>
<td><strong>Cont Per</strong></td>
<td>Number of months during a continuous 12-month period that the employee is contracted to work</td>
</tr>
<tr>
<td><strong>Grd</strong></td>
<td>2-digit Pay Grade for the position</td>
</tr>
<tr>
<td><strong>Dept Name</strong></td>
<td>Name of the department</td>
</tr>
</tbody>
</table>
Staff Procedures – Table of Contents

Using the Merit by SAU - Staff page
   Viewing Information
   Applying Approval
   Entering Evaluation Rating
   Entering Merit Increase:
      Pct Increase
      $ Increase
      New Comp Rate
      New Annual Rate

Using the Mass approval feature

Using the Merit by Employee - Staff page
   Viewing Information
   Applying Approval
   Entering Evaluation Rating
   Entering Merit Increase:
      Pct Increase
      $ Increase
      New Comp Rate
      New Annual Rate
   Extending Appointment End Date
   Extending Position End Dates

Discretionary Increase Allocation
   Discretionary Increase Purpose
   Discretionary Increase Process
   How to enter a Discretionary Increase
Using the Merit by SAU – Staff page

Entering Information on the Merit by SAU – Staff Page

The Merit by SAU - Staff page is used for the data entry and approvals of merit increases by SAU for both monthly and bi-weekly staff. The following procedures should be followed to view and update the information on the Merit by SAU – Staff page.

Rules:

1. Only Staff may be viewed on the page.
2. Valid Salary Plans for the Staff page are EXS, ITS, EXC, NEX, and UPD.
3. This page has security, so you may only view employees with Salary Administration Units for which you have access.

Merit By SAU - Staff Viewing Information

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- Merit by SAU - Staff

The Search page will be displayed.

Enter the Salary Administration Unit or Salary Plan that you would like to view.

Click Search.

A list of the SAUs and Salary Plans within the search criteria will appear in the Results box.
Merit By SAU - Staff Applying Approval

Before the evaluation and Merit Increase are entered (whether Pct Incr, $ Incr, New Comp Rt, or New Annl Rt) an appropriate approval must be applied.

Verify the name of the individual to whom you will be giving a Merit Increase.

Tab to the field marked Merit Appr.

Pull down the arrow and choose the appropriate approval level:
- P - Planning,
- D - Departments,
- N - No Entry,
- R - Rejected,
- Z – Zero, or
- S - School.

Note: If the employee is not eligible for a merit increase - choose the approval level N - No Entry or Z – Zero (if merit is not granted based upon performance), R - Rejected to close out the page.

This will assist you when running queries to check that all entries have been done.
**Entering Evaluation Rating – Loaded onto Job Data in HRIS**

Tab to the Eval field and enter the ranking from your Performance Evaluation for the employee. The number cannot be less than 1 or greater than 7.

Use the following format: X.XX

To give the individual a "5", enter 5. To give the individual a "4.25" evaluation rating, enter 4.25.

*Please Note:* When loaded into HRIS, the rate will round down to the nearest tenth. For example, 4.25 will display 4.20.

**Merit by SAU – Staff header page**

The following information is located in the header of the Merit by SAU – Staff page. Please see definitions for fields below:

SAU and Salary Plan are displayed in the first row.

**Goal Merit Increase %** = Proposed percentage increase to be given to the SAU and Salary Administration plan

**Goal Merit Increase $** = Proposed sum of Dollar amount that can be distributed to employees within a SAU. See calculation below:

\[
\text{Goal Merit Inc $} = \text{total current salaries multiplied by Goal Merit % Increase.}
\]
### Total Merit Increase %
Percent increase of all employees combined within a SAU, after merit increase entry.

### Total Merit Increase $
Sum of all dollar amount increases given to employees within a SAU (after merit increase entry).

### Total Merit Comparison
SAU comp ratio. Used to determine if a SAU is eligible for Market Allocation when available.

### Goal Discretionary Pct
The proposed Goal discretionary Percentage to be given to eligible employees within an eligible SAU. This percentage is equal to .5 percent.

### Goal Discretionary Amt
Goal Discretionary Percent multiplied by total current salaries.

### Actual Discretionary Pct
Total Discretionary Amount increase divided by Total Current Salaries.

### Actual Discretionary Amt
Total Increase amount subtracted by total merit increase amount.
**Total Current Salaries** = sum of all current annual salaries for all employees within the same SAU and Salary Plan

**Total New Salaries** = sum of all new annual salaries for all employees within the same SAU and Salary Plan (after entry of merit increases and discretionary increases if applicable).

**Total Percent Increase** = Total Merit % Inc plus Discretionary Increase Pct.

**Total Amt Increase** = Total Merit $ Inc plus Total Discretionary Increase Amt

---

![Salary Planning Instructions](image)
Page Layout

Select tabs to view the Salary Planning page depending on the driving factor used for the increase.

Each tab will display fields of information corresponding to the tab’s heading.

To view all fields at one time, select All Fields tab.

Percent Increase tab

* Make sure you are in Correction Mode.

Enter the total Percent Merit Increase for the individual using the following format:

    4.5 for 4.50

By pressing tab after entering the percent increase, the NW Annual Rate and New FTE Salary will be automatically updated to reflect the increase.

You can also use New Annual Rate to input increase information within this tab.

OR
**Dollar Amount tab**

*Make sure you are in correction mode.*

Enter the total dollar amount of Merit Increase by which you are increasing either the monthly or hourly rate – depending on the paygroup of the selected employee.

Example: Enter 1.10 to give a bi-weekly employee an additional $1.10 per hr.

Example: Enter 100 to give a monthly employee an additional $100.00 per mo.

By pressing tab after entering dollar increase Pct Inc, New Comp Rt, New FTE Sal will be automatically updated to reflect the increase.

You can also use Pct Increase and/or New Comp Rate to input increase information within this tab.

OR
New Annual Rate tab

Enter the total amount of Merit Increase for the individual expressed as a new annual rate in dollars

Ex: Enter 23,000 to give a biweekly/monthly employee an annual compensation rate of $23,000.

By pressing tab after entering the New Annl Rate, Pct Incr, and New FTE Sal will be automatically updated to reflect the increase.

The New Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid biweekly or monthly.

You can also use Pct Increase to input increase information within this tab.
All Fields tab

Use the All Fields tab to enter data in any of the four fields and view every field for an employee at one time:

- Percent Increase
- Dollar Amount
- New Comp Rate
- New Annual Rate

Save

Click the Save button.

Ability to Mass Approve Data Entry

Users have the ability to mass approve data entry on any Salary Planning panels that contain a grid. The following Salary Planning panels contain a grid:

- Merit by SAU – Faculty & Staff
- Reappointment – Faculty
- Promotion – Faculty
- Salary Readjustment – Faculty
## Step 1

For example, using the Merit by SAU – Staff panel, merit increases were entered for employees within one SAU.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Apply the appropriate approval level by entering a value into the <strong>Mass Merit Approval</strong> field. The values are: A – Administration <em>(used by Compensation)</em>, D-Departments, N-No Entry, P – Planning, R- Rejected, Z-Zero or S-School</td>
</tr>
</tbody>
</table>

### Example

<table>
<thead>
<tr>
<th>SAU</th>
<th>Sol Pin</th>
<th>NEX</th>
<th>Goal Merit % Incr</th>
<th>Goal Market Alloc Pct</th>
<th>Goal Merit $ Incr</th>
<th>Goal Market Alloc Amt</th>
<th>Total Merit % Incr</th>
<th>Total Market Alloc Pct</th>
<th>Total Merit $ Incr</th>
<th>Total Market Alloc Amt</th>
<th>Total Combined Comparative</th>
</tr>
</thead>
<tbody>
<tr>
<td>444400</td>
<td>1042408</td>
<td>1</td>
<td>3.50</td>
<td>1.00</td>
<td>1941.87</td>
<td>554.92</td>
<td>3.50</td>
<td>0.00</td>
<td>1941.84</td>
<td>0.00</td>
<td>0.87</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Percent Increase</th>
<th>Total Amount</th>
<th>New Comp Rate</th>
<th>New Annual Rate</th>
<th>All Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Merit App.</strong></td>
<td><strong>Dept ID</strong></td>
<td><strong>Name</strong></td>
<td><strong>ID</strong></td>
<td><strong>Comp Rt</strong></td>
</tr>
<tr>
<td>1 F</td>
<td>272502</td>
<td>Campus, Cynthia</td>
<td>1042408</td>
<td>9</td>
</tr>
<tr>
<td>2 F</td>
<td>277702</td>
<td>Purple, John</td>
<td>1055279</td>
<td>9</td>
</tr>
</tbody>
</table>

**Mass Merit Approval**: 

### Step 2

Once a Merit Approval letter is entered, click the yellow **Approve** button to apply the approval letter to **ALL** rows within the grid.

### Step 3

Be sure to click the yellow **Save** button to save these approval level changes.
Using the Merit by Employee – Staff Page

The Merit by Employee - Staff page only allows data entry for one individual at a time.

Merit by SAU – Staff page should be used for multiple data entries.

Rules:

1. Only Staff may be viewed on the page.
2. Valid Salary Plans for the Staff page are EXS, ITS, EXC, NEX, and UPD.
3. This page has security, so you may only view employees with Salary Administration Units for which you have access.

Merit By Employee - Staff Viewing Information

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- Merit by Employee - Staff

The Search page will be displayed.

Enter the Name or Employee ID of the Staff member you would like to view.

You can also choose to view information using the NW Salary Admin Unit or the Salary Administration Plan criteria.

Click Search.

A list of the employees within the search criteria will appear alphabetically in the Results box. Select the employee that you would like to view by clicking on the desired line.
### Merit By Employee - Staff Applying Approval

Before the Evaluation and Merit Increase are entered (whether Pct Incr, $ Incr, New Comp Rt, or New Annl Rt) an appropriate approval must be applied.

Tab to the field marked Merit Appr.

Pull down the arrow and choose the appropriate approval level:
- **P** - Planning,
- **D** - Departments,
- **N** - No Entry,
- **R** - Rejected,
- **Z** - Zero, or
- **S** - School.

**Note:** If the employee is **not** eligible for a merit increase - choose the approval level **N** - No Entry or **Z** – Zero (if merit is not granted based upon performance), **R** - Rejected to close out the page.

This will assist you when running queries to check that all entries have been done.
**Entering Evaluation Rating – Loaded onto Job Data in HRIS**

Verify that you have the correct employee on the page.

Tab to the Eval field and enter your ranking from the Performance Evaluation for the employee. The number cannot be less than 1 or greater than 7.

Use the following format: **X.XX**

Ex: To give the individual a "5", enter 5. To give the individual a "4.25" evaluation, enter 4.25.

**Please Note:** When loaded into HRIS, the rate will round down to the nearest tenth. For example, 4.25 will display 4.20.

---

**Merit Increase**

[Image of a merit increase interface]

The evaluation field will load into the Salary History Table in HRIS with the Merit Increase load.
Merit By Employee - Staff

Merit Increases for Staff may be done in one of four ways - by entering a percent value for the increase, a dollar value for the increase, an hourly/monthly compensation rate, or an annual rate.

Merit Increase by Percent Increase

Tab to the field marked **Pct Incr**.

Enter the total Percent of Merit Increase for the individual using the following format:

Ex: Enter 3.25 for a 3.25% Increase

After the Pct Incr is entered, tab once and $ Incr, New Comp Rt, and New Annl Rt will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

**Save**

Click the Save button.

**OR**
Merit Increase by Dollar Increase

Tab to the field marked $ Incr.

Enter the total amount of Merit Increase for the individual expressed as a dollar amount.

Ex: Enter 1.35 to give a bi-weekly employee an additional $1.35 per hour.

Ex: Enter 100 to give a monthly employee an additional $100.00 per month.

After the $ Incr is entered, tab once and Pct Incr, New Comp Rt, New FTE Salary and New Annl Rt, will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

Save

Click the Save button.

OR
Merit Increase by New Compensation Rate

Tab to the field marked **New Comp Rt.**

Enter the total amount of Merit Increase for the individual expressed as a new hourly or monthly amount.

Biweekly Example: Enter 15.20 to give a bi-weekly employee an hourly compensation rate of $15.20.

Monthly Example: Enter 2300 to give a monthly employee a monthly compensation rate of $2,300.

After the New Comp Rt is entered, tab once and Pct Incr, $ Incr, New Annl Rt, and New FTE Sal will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

Save

Click the Save button.

OR
**Merit Increase by Entering New Annual Rate**

Tab to the field marked **New Annl Rt.**

Enter total amount of Merit Increase for the individual expressed as a new annual rate in dollars.

Ex: Enter 36500 to give a monthly employee an annual compensation rate of $36,500.

After the New Annl Rt is entered, tab once and Pct Inc, New Comp Rt, $ Incr, and New FTE Sal will be automatically updated to reflect the increase.

The New Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid biweekly or monthly.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

**Save**

Click the Save button.

OR
## Extending Appointment End Date and Position End Date

### Applying Reappointment Approval

Before the reappointment has been entered, the appropriate approval must be applied.

Tab to the field marked Reap Approval.

Pull down the arrow and choose the appropriate approval level:
- **P** – Planning,
- **D** – Departments,
- **N** – No Entry,
- **R** – Rejected, or
- **S** – School.

### Extending Appointment End Date

To extend Staff appointments, tab to the New Appt End field and type in the new appointment end date, using the following date format:

04/30/2009  mm/dd/yyyy

If the new end date is indefinite, click the checkbox marked New Indef End.

Position end date must be equal to or greater than the New Appt End date.

If you make the appointment indefinite (New Indef End) then either the New Posn Indef End box or the Posn Indef End box in the page header must be checked.
### Extending Position End Date

To extend Staff position end date, tab to the New Posn End Dt field in the page header and type in the New Posn End Dt, using the following date format:

`Mm/dd/yyyy` - `04/30/2009`

If the new position end date is indefinite, click the checkbox marked New Posn Indef End.

### Save

Click the Save button.
Discretionary Allocation

- After merit increase decisions have been entered, a Discretionary Increase Allocation equal to .5% of the total current salaries can be granted to 20% of staff employees. A Discretionary Increase can be transferred among salary plans (NEX, EXS, ITS).

Purpose:
- Retain key/critical employees
- Recognize high performers/high potential employees

Process:
Enter justification in comment section on the Merit by Employee – Staff panel
Examples:
- Unique skills critical to dept
- Position difficult to recruit
- Position difficult to retain
- Exceptional performance

Compensation maintains final approval.
Enter Discretionary Allocation by Dollar Amount or Percent

Enter the total amount of Discretionary Increase for the individual expressed as a dollar amount.

Ex: Enter .94 to give a bi-weekly employee an additional .94 per hour.

Ex: Enter 190.84 to give a monthly employee an additional $190.84 per month.

After the Discretionary $ Incr is entered, tab once and the Discretionary % Incr field will be automatically updated to reflect the increase.

Save

Click the Save button.

OR
Faculty Procedures – Table of Contents

SAU Change Procedures

Using the Merit by SAU - Faculty page
   Viewing the Merit by SAU – Faculty Header
   Applying Approval
   Entering Merit Increase
      Pct Increase
      $ Increase
      New Comp Rate
      New Annual Rate
   Entering New Full Time Equivalent Salary for Faculty
   Entering New Contract Period

Using the Mass approval Feature

Using the Merit by Employee - Faculty page
   Applying Approval
   Entering Merit Increase
      Pct Increase
      $ Increase
      New Comp Rate
      New Annual Rate
   Entering New FTE Salary
   Entering New Contract Period
   Extending Faculty Appointments
   Extending Position End Date
   Entering Faculty Promotion

Using the Reappointment Faculty page
   Viewing Information
   Extending Faculty Appointment
   Extending Position End Date

Using the Promotion Faculty page
   Viewing Information
   Applying Approval
   Promoting Faculty
   Entering the New FTE Salary

Viewing the Multiple Appointment Faculty page
SAU Change Procedures

Using the SAU Change Page for Faculty

When a Salary Administration Unit must be added, deleted, or changed on the employee’s position information, the Change must be data entered on the SAU Change page within HRIS. The following steps listed below will update the Salary Administration Unit for an employee.

Rules:

1. This page has security, so you may only view employees with Salary Administration Units for which you have security access.
2. You will be able to view an employee who does not have a Salary Administration Unit entered on their position, as long as you have access to view their department.

SAU Change – Faculty

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- SAU Change

The SAU Change search page will be displayed.

Enter the Name (last name, first name) or Employee ID of the individual for whom you would like to change the Salary Administration Unit.

Click Search.

If multiple job records for the employee appear in the Results box, select the record # that should have the SAU Change by clicking on the line.
**SAU Change – Faculty – Adding SAU**

**To Assign an Employee to an Existing SAU who is not currently assigned to an SAU**

You may assign an employee to an existing SAU.

Tab to the **New SAU** field and enter the new 6-digit SAU.

You will be able to immediately view and update the employee in the Merit by SAU - Staff page.

A nightly process will add the Salary Administration Unit to the SAU field on the SAU Change page, and create an audit trail.

**Lookup Menu**

Use Magnifying Glass to bring up a list of existing SAUs. Click on desired SAU to populate SAU field appropriately.

**Save**

Click the Save button.
**SAU Change – Faculty – Deleting SAU**

**SAU** - Will be populated with the current SAU.

Tab to the **New SAU** field, the SAU number in the field will be highlighted. Hit the Delete key.

The individual will automatically disappear from your page.

A nightly process will delete the Salary Administration Unit from the SAU field on the SAU Change page, and create an audit trail.

**Save**

Click the Save button.

**SAU Change – Faculty – Changing SAU**

**SAU** - Will be populated with the current SAU.

Tab to the **New SAU** field and enter the new 6-digit SAU.

You will be able to immediately view and update the employee in the Merit by SAU - Staff page using the new Salary Administration Unit.

A nightly process will Change the Salary Administration Unit in the SAU field on the SAU Change page, and create an audit trail.

**Save**

Click the Save button.
Using the Merit by SAU – Faculty page

The Merit by SAU – Faculty page is used for the data entry and approvals of merit increases for faculty. The following procedures should be followed to view and update the information on the Merit by SAU – Faculty page.

Rules:

1. Only Faculty may be viewed on the page.
2. Valid Salary Plans for the Faculty page are FAC, ACS, and LIB.
3. This page has security. You may only view employees with Salary Administration Units for which you have access.

MERIT BY SAU – FACULTY Viewing Information

Logon to HRIS
- Compensation
- Base Compensation
- Merit Increases
- Merit by SAU – Faculty

The Search page will be displayed.

Enter the Salary Administration Unit or Salary Plan that you would like to view.

Click Search.

A list of the SAUs and Salary Plans within the search criteria will appear in the Results box.
Merit by SAU – Faculty panel – Viewing the Header

On the top half of the Merit by SAU – Faculty page, a data enterable field for Goal Merit Percent Increase is displayed. Enter the Goal Merit Percent Increase for your SAU.

Once you click save the Goal Merit Increase Amount will populate.

When the merit increases have been entered and saved, the Total New Salaries, Total Pct Increase and Total Increase Amount fields will update to reflect the merit increases.

Definitions from the merit by SAU – Faculty panel

**Total Current Salaries** = sum of all current annual salaries for all employees within the same SAU and Salary Plan

**Total New Salaries** = sum of all new annual salaries for all employees within the same SAU and Salary Plan (after entry of merit increases).

**Goal Merit Percent Increase** = proposed merit percent increase to be given to employees within a particular SAU and Salary Plan.

**Goal Merit Increase Amount** = proposed dollar increase to be given to employees within a particular SAU and Salary Plan. See the calculation below.

\[
\text{Goal Merit Increase Amount} = \text{Total Current Salaries multiplied by Goal Merit Percent Increase}
\]

**Total percent Increase** = Percent increase of all employees combined within a SAU, after merit increase entry.

**Total Increase Amount** = sum of all dollar amount increases given to employees within a SAU (after merit increase entry).
MERIT BY SAU – FACULTY Applying Approval

Before the Merit Increases are entered (whether Pct Incr, $ Incr, New Comp Rt, or New Annl Rt) an appropriate approval must be applied.

Verify the name of the individual to whom you will be giving a merit increase.

Tab to the field marked Merit Appr.

Pull down the arrow and choose the appropriate approval level:

P – Planning,
D – Departments,
N – No Entry,
R – Rejected, or
S - School.

Note: If the employee is not eligible for a merit increase – choose the approval level N – No Entry or R – Rejected to close out the page.

This will assist you when running queries to check that all entries have been done.
**Entering Merit Increase**

**Page Layout**

Select tabs to view the Salary Planning data depending on the driving factor used for the increase. Each tab will display fields of information corresponding to the tab’s heading.

To view all fields at one time, select All Fields tab.

**Percent Increase tab**

*Make sure you are in Correction Mode

Enter the total Percent of Merit Increase for the individual using the following format:

4.5 for 4.50

By pressing tab after entering the percent increase, the New Annual Rate will be automatically updated to reflect the increase.

You can also use New Annual Rate to input increase information within this tab.

The data enterable field for New FTE Salary must also be entered.

If promoting the faculty member, access the Promotion - Faculty page to enter the salary increase and Change in Job Code.

**OR**
Dollar Amount tab

Enter the total amount of Merit Increase for the individual expressed as a dollar amount.

Ex: Enter 1000 to give an employee an additional $1000.00 per month.

By pressing tab after entering the dollar increase, the New Comp Rt and Pct Inc fields will be automatically updated to reflect the increase.

You can also use New Comp Rate and/or Pct Increase to input increase information within this tab.

The data enterable field for New FTE Salary must also be entered.

If promoting the faculty member, access the Promotion - Faculty page to enter the salary increase and Change in Job Code.

<table>
<thead>
<tr>
<th>ID</th>
<th>Grid</th>
<th>Comp Rt</th>
<th>Annl Rt</th>
<th>$ Incr</th>
<th>New Comp Rt</th>
<th>Pct Incr</th>
<th>New FTE Sal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1004181</td>
<td>2</td>
<td>5662.420800</td>
<td>67949.94</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>114332.94</td>
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<td></td>
<td></td>
</tr>
<tr>
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</tr>
<tr>
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<td>85003.94</td>
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<td></td>
<td></td>
</tr>
<tr>
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<td>6694.960800</td>
<td>63450.72</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OR
### New Compensation Rate tab

Enter the total amount of Merit Increase for the individual expressed as a new monthly compensation rate in dollars.

Ex: Enter **2300** to give an employee a monthly compensation rate of $2,300.

By pressing tab after entering a new compensation rate, Pct Inc will be automatically updated to reflect the increase.

You can also use Pct Increase to input increase information within this tab.

The data enterable field for New FTE Salary must also be entered.

<table>
<thead>
<tr>
<th>ID</th>
<th>Grc</th>
<th>Comp Rte</th>
<th>New Comp Rte</th>
<th>Pct Incr</th>
<th>New FTE Sal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1004191</td>
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<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
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<td>9527.670000</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
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<td>2</td>
<td>3333.330000</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>1047215</td>
<td>0</td>
<td>541.870000</td>
<td></td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>1047215</td>
<td>3</td>
<td>8894.560000</td>
<td></td>
<td>+</td>
<td></td>
</tr>
</tbody>
</table>
**New Annual Rate tab**

Enter the total amount of Merit Increase for the individual expressed as a new annual rate in dollars

Ex: Enter **74400** to give an employee an annual compensation rate of $74,400.

By pressing tab after entering a new annual rate, Pct Incr will be automatically updated to reflect the increase.

The New Annual Rate may Change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid monthly.

You can also use Pct Increase to input increase information within this tab.

The data enterable field for New FTE Salary must also be entered.

<table>
<thead>
<tr>
<th>ID</th>
<th>Grd</th>
<th>Annl Rtl</th>
<th>New Annl Rtl</th>
<th>Pct Incr</th>
<th>New FTE Sal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1034191</td>
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<td>67949.04</td>
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<tr>
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<td>+</td>
<td>-</td>
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<td></td>
<td>+</td>
<td>-</td>
</tr>
<tr>
<td>1047215</td>
<td>3</td>
<td>82734.72</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Entering New Full Time Equivalent Salary for Faculty

Tab to the New FTE Sal field on any tab.

Enter in the new Full Time Equivalent Salary based upon your School's calculation for FTE.

**Formula:**
New FTE Sal = monthly compensation rate x 12 divided by percent full time.

**Example at 100% Full Time:**
($4,150 x 12) / 100% = $49,800

**Example at 50% Full Time:**
($3,000 x 12) / 50% = $72,000

The FTE Salary on this page is figured as the FTE Salary per appointment or job.

<table>
<thead>
<tr>
<th>ID</th>
<th>Grd</th>
<th>Annl Rl</th>
<th>New Annl Rl</th>
<th>Pct Incr</th>
<th>New FTE Sal</th>
</tr>
</thead>
<tbody>
<tr>
<td>1034191</td>
<td>2</td>
<td>67949.04</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1039371</td>
<td>1</td>
<td>114332.04</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1022216</td>
<td>2</td>
<td>39999.96</td>
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<td></td>
</tr>
<tr>
<td>1047215</td>
<td>0</td>
<td>6500.04</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1047215</td>
<td>3</td>
<td>82734.72</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Entering New Contract Period for Faculty

You can enter a new Contract Period for faculty on the Merit by SAU – Faculty page.

Select the All Fields tab.

The Contract Period fields are displayed at far-right side of the page.

The current Contract Period will display in the first field and in the data enterable field. If this field requires adjustment, type over the Contract Period value in the data-enterable field to the right labeled New Contract Period.

This new value will load into HRIS with the Merit Increase data in August.

Click the Save button.

<table>
<thead>
<tr>
<th>Contract Period</th>
<th>New Contract Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>12</td>
<td>12</td>
</tr>
<tr>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>
Ability to Mass Approve Data Entry
Users have the ability to mass approve data entry on any Salary Planning panels that contain a grid. The following Salary Planning panels contain a grid:

- Merit by SAU – Faculty & Staff
- Reappointment – Faculty
- Promotion – Faculty
- Salary Readjustment – Faculty

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Apply the appropriate approval level by entering a value into the <strong>Mass Merit Approval</strong> field. The values are: A – Administration, D-Departments, N-No Entry, P – Planning, R- Rejected, or S-School</td>
</tr>
</tbody>
</table>

For example, using the Merit by SAU – Faculty panel, merit increases were entered for employees within one SAU.
2. Once a Merit Approval letter is entered, click the yellow Approve button to apply the approval letter to ALL rows within the grid.

3. Be sure to click the yellow Save button to save these approval level Changes.
Using the Merit by Employee – Faculty Page

The Merit by Employee – Faculty page allows data entry for only one individual at a time.

The Merit by SAU – Faculty page should be used for multiple employee data entry.

This panel is available to non-medical school users only

Rules:
1. Only Faculty may be viewed on the page.
2. Valid Salary Plans for the Faculty page are FAC, ACS, and LIB.
3. This page has security. You may only view employees with Salary Administration Units for which you have access.

MERIT BY EMPLOYEE – FACULTY Viewing Information

Logon to HRIS
- Compensation
- Base Compensation
- Merit Increases
- Merit by Employee – Faculty

The Search page will be displayed.

Enter the Name or Employee ID of the Faculty member you would like to view.

You can also choose to view information using the NW Salary Admin Unit or the Salary Administration Plan criteria.

Click Search.

A list of the employees within the search criteria will appear alphabetically in the Results box. Select the employee that you would like to view by clicking on the line.
### MERIT BY EMPLOYEE – FACULTY Applying Approval

Before the Merit Increase is entered (whether Pct Incr, $ Incr, New Comp Rt, or New Annl Rt) an appropriate approval must be applied.

Tab to the field marked Merit Appr.

Pull down the arrow and choose the appropriate approval level:
- **P** – Planning,
- **D** – Departments,
- **N** – No Entry,
- **R** – Rejected, or
- **S** – School.

**Note:** If the employee is not eligible for a merit increase – choose the approval level **N** – No Entry or **R** – Rejected to close out the page.

This will assist you when running queries to check that all entries have been done.
Merit By – Faculty Merit Increase

Merit Increases for Faculty may be done in one of four ways - by entering a percent value for the increase, a dollar value for the increase, a new monthly compensation rate, or a new annual rate.

Merit Increase by Percent Increase

Tab to the field marked Pct Incr.

Enter the total Percent of Merit Increase for the individual using the following format:

Ex: Enter 3.25 for a 3.25% Increase

After the Pct Incr is entered, tab once and $ Incr, New Comp Rt, and New Annl Rt will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

Save

Click the Save button.

OR
### Merit Increase by Dollar Increase

Tab to the field marked **$ Incr**.

Enter the total amount of Merit Increase for the individual expressed as a dollar amount.

**Ex:** Enter 1000 to give an employee an additional $1000.00 per month.

After the **$ Incr** is entered, tab once and **Pct Incr**, **New Comp Rt**, and **New Annl Rt**, will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

### Save

Click the **Save** button.

---

**OR**
### Merit Increase by New Compensation Rate

Tab to the field marked **New Comp Rt**.

Enter the total amount of Merit Increase for the individual expressed as a new monthly compensation rate in dollars.

*Ex: Enter 2300 to give an employee a monthly compensation rate of $2,300.*

After the New Comp Rt is entered, tab once and Pct Incr, $ Incr, and New Annl Rt, will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

#### Save

Click the Save button.

#### OR
Merit Increase by Entering New Annual Rate

Tab to the field marked **New Annl Rt.**

Enter the total amount of Merit Increase for the individual expressed as a new annual rate in dollars.

Ex: Enter 74400 to give an employee an annual compensation rate of $74,400.

After the New Annl Rt is entered, tab once and Pct Inc, $ Incr, and New Comp Rt will be automatically updated to reflect the increase.

The New Annual Rate may Change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid monthly.

Tab over to the comment field to add a comment. There is a 30-characters maximum on this field.

**Save**

Click the Save button.
**New FTE Salary**

Tab to the field marked New FTE Sal.

Enter in the new Full Time Equivalent Salary based upon your School's calculation for FTE.

**Formula:**
New FTE Sal = New Comp Rt x 12 divided by percent full time

**Example at 100% Full Time:**
($4,150 \times 12) / 100\% = $49,800

**Example at 50% Full Time:**
($3,000 \times 12) / 50\% = $72,000

The FTE Salary on this page is figured as the FTE Salary per appointment or job.
New Contract Period

Contract Period is a data-enterable field.

You will see two fields, one in display mode with the current Contract Period held in HRIS.

Immediately below is the field New Contract Period, where you can enter a new contract period if necessary. If this field requires adjustment, type over the Contract Period value in the data-enterable field.

Any new value entered to this field will load into HRIS with the Merit Increase data in August.
### Merit by Employee – FACULTY

#### Applying Reappointment Approval

Before the reappointment has been entered, the appropriate approval must be applied.

Tab to the field marked Reap Approval.

Pull down the arrow and choose the appropriate approval level:
- **P** – Planning,
- **D** – Departments,
- **N** – No Entry,
- **R** – Rejected, or
- **S** – School.

---

#### Extending Faculty Appointments

To extend Faculty appointments, tab to the New Appt End field and type in the new appointment end date, using the following date format:

```
mm/dd/yyyy - 08/31/2008
```

If the new end date is indefinite, click the checkbox marked New Indef End.

Posn End Dt (or New Posn End Dt) must be equal to or greater than the New Appt End date.

If you make the appointment indefinite (New Indef End) then either the New Posn Indef End box or the Posn Indef End box in the page header must be checked.
Extending Faculty Position End Date

To extend Faculty position end date, go to the New Posn End Dt field in the page header and type in the new position end date, using the following date format:

mm/dd/yyyy - 04/30/2009

If the new position end date is indefinite, click the checkbox marked New Posn Indef End.
## Merit by Employee – Faculty

### Applying Promotion Approval

Before the promotion has been entered, the appropriate approval must be applied.

Tab to the field marked Prom Approval.

Pull down the arrow and choose the appropriate approval level:
- **P** – Planning,
- **D** – Departments,
- **N** – No Entry,
- **R** – Rejected, or
- **S** – School.

### Entering Faculty Promotion

To promote a Faculty member, tab to the New Job Cd field and enter in the new job code.

The New Job Title field will fill in automatically from the New Job Cd.

**Save**

Click the Save button.
Using the Reappointment Faculty page

The Reappointment Faculty page is used for the data entry of reappointment information for Faculty. The following procedures should be followed to view and update the information on the Reappointment Faculty page.

Rules:

1. Only Faculty may be viewed and reappointed on the page.
2. Valid Salary Plans for the Faculty page are FAC, ACS, and LIB.
3. This page has security, so you may only view employees with Salary Administration Units for which you have access.

Reappointment Faculty – Viewing Information

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- Reappointment – Faculty

The Search page will be displayed.

Enter the Salary Administration Unit or Salary Plan that you would like to view.

Click Search.

A list of the SAUs and Salary Plans within the search criteria will appear in the Results box.
Reappointment Faculty – Applying Approval

Before the reappointment has been entered, the appropriate approval must be applied.

Tab to the field marked Reap Appr.

Pull down the arrow and choose the appropriate approval level:
P – Planning,
D – Departments,
N – No Entry,
R – Rejected, or
S – School.

Extending Faculty Appointments

To extend Faculty appointments, tab to the New Appt End field and type in the new appointment end date, using the following date format:

mm/dd/yyyy – 08/31/2008

If the new end date is indefinite, click the checkbox marked New Indef End.

Posn End Dt (or New Posn End Dt) must be equal to or greater than the New Appt End date. To view current Position End Dt, click the All Fields tab.

If you make the appointment indefinite (New Indef End) then either New Posn Indef End box or the Posn Indef End box must be checked.
## Extending Faculty Position End Date

To extend Faculty position end date, tab to the New Posn End Dt field and type in the new position end date, using the following date format:

- mm/dd/yyyy – 04/30/2009

If the new position end date is indefinite, click the checkbox marked New Posn Indef End.

Please note: Click the All Fields tab to view current Position End Date.

### Save

Click the Save button.
Using the Promotion Faculty page

The Promotion Faculty page is used for the data entry of promotion information for Faculty. The following procedures should be followed to view and update the information on the Promotion Faculty page.

Rules:

1. Only Faculty may be viewed and promoted on the page.
2. Valid Salary Plans for the Faculty page are FAC, ACS, or LIB.
3. This page has security, so you may only view employees with Salary Administration Units for which you have access.

Promotion Faculty - Viewing Information

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- Promotion – Faculty

The Search page will be displayed.

Enter the Salary Administration Unit or the Salary Plan that you would like to view.

Click Search.

PROMOTION FACULTY - Applying Approval

Before the promotion has been entered, the appropriate approval must be applied.

Tab to the field marked Prom Appr.

Pull down the arrow and choose the appropriate approval level:

P - Planning,
D - Departments,
N - No Entry,
R - Rejected, or
S - School.
## Promoting Faculty

Verify the name of the individual that will be promoted.

To promote a Faculty member, tab to the New Job Cd field and enter in the new job code.

The New Job Title field will fill in automatically from the New Job Cd.

<table>
<thead>
<tr>
<th>Job Cd</th>
<th>Job Title</th>
<th>New Job Cd</th>
<th>New Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>100057</td>
<td>Vstg Asst</td>
<td>100022</td>
<td>Professor</td>
</tr>
<tr>
<td>100022</td>
<td>Professor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100105</td>
<td>Senior Lec</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100018</td>
<td>Assoc Prof</td>
<td></td>
<td></td>
</tr>
<tr>
<td>100018</td>
<td>Assoc Prof</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Entering the New Full-Time Equivalent Salary

Click **All Fields** Tab

Tab to the New FTE Sal field

Enter in the new Full Time Equivalent Salary based upon your School’s calculation for FTE.

**Formula:**

New FTE Sal = monthly compensation rate x 12 divided by percent full time.

**Example at 100% Full Time:**

\[ \frac{\$4,150 \times 12}{100\%} = \$49,800 \]

**Example at 50% Full Time:**

\[ \frac{\$3,000 \times 12}{50\%} = \$72,000 \]

The FTE Salary on this page is figured as the FTE Salary per appointment or job.

**Save**

Click the Save button.
**Viewing the Multiple Appointment - Faculty Page**

The Multiple Appointment - Faculty page is a view-only page. This page is used to view faculty members' current salaries from all appointments. Data entry is not performed on this page; it is for viewing purposes only.

**Rules:**

1. Only Faculty may be viewed on this page.
2. You may view all appointments for an individual, as long as you have security access to view at least one of the faculty member's Salary Administration Units.

**Multiple Appointment – Faculty Viewing Information**

Logon to HRIS
- Compensation
- Base Compensation
- Merit Increases
- **Multi Appointment – Faculty**

The Search page will be displayed.

Enter the **Empl ID** or **Name** of the employee that you would like to view.

Click Search.

A page with all of the faculty member's appointments will appear.
Medical School Faculty Procedures

Salary Adjustment and Merit Overview

Users have the ability to give Salary adjustments and Merit Increases to Medical School Faculty. The Salary Adjustment capability is only available for medical school faculty. Salary adjustments can be entered as a positive or negative amount in the adjustment fields. Approved salary adjustments will be loaded into HRIS separately from the merit increase; however, they will be loaded the same day. The salary adjustment will be the first change that is loaded to the employee’s record. The effective date of the adjustments will be 9/01 and the action/reason will be SAL/ADJ.

Only users who have access to medical school faculty will have security access to view the Salary Adjustment and Merit Increase panels. Salary adjustments will be entered by using one of the following panels:

- Sal Adj and Merit Inc by SAU- Faculty Med
- Merit by Empl Faculty - Med

Rules:
1. These panels are for Medical School faculty only
2. Salary adjustments must be entered before a merit increase. If a merit increase has already been entered for the employee, the Salary adjustment will not be allowed.
3. Negative amounts will be accepted in the adjustment fields
4. Approved or pending adjustments will be reflected in the Merit Increase section of the “Merit by Empl Faculty – Med” and “Sal Adj and Merit Inc by SAU – Faculty Med” panel

Salary Adj and Merit Inc by SAU – Faculty MED panel

Salary Adj and Merit Inc by SAU – Faculty MED panel allows a user to enter salary adjustments and merit increases for multiple employees (within an SAU and Salary Administration Plan) on the same page.

Logon to HRIS
- Compensation
- Base Compensation
- Merit Increases
- Sal Adj and Mer Inc Fac Med

Enter the Salary Admin Unit and/or Salary Administration plan.

Click Search.
Salary Adj and Merit Inc by SAU – Faculty Med -Viewing the Header

On the top half of the Salary Adj and Merit Inc by SAU – Med Faculty page, there are totals of current salaries, Adjustment Totals, Merit Inc totals and Pct Changes.

When the salary adjustments and merit increases have been entered and saved, the Totals, Amt Changes and Pct Changes will update to reflect the merit increases.

<table>
<thead>
<tr>
<th>SAU</th>
<th>Sal Plan</th>
<th>FAC</th>
<th>Total Current Salaries</th>
<th>Total Adj Salaries</th>
<th>Total Adjustment and Merit Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>406000</td>
<td></td>
<td></td>
<td>1,658,527.68</td>
<td>1,671,847.84</td>
<td>1,671,847.84</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Adjustment Amount Change</th>
<th>Total Merit Amount Change</th>
<th>Total Adjustment Pct Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>15,119.76</td>
<td>0.91</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Merit Pct Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Merit Pct Change</td>
</tr>
</tbody>
</table>

Definitions from the Salary Adj and Merit Inc by SAU – Faculty Med panel

**Total Current Salaries** = sum of all current annual salaries for all employees within the same SAU and Salary Plan

**Total Adj Salaries** = Sum of Adjusted Annual Rate for those who received adjustments + Sum of Annual Rate for those who did not receive adjustments for all employees in the SAU

**Total Adjustment and Merit Change** = Sum of Total Adjusted Salaries + Total Merit Amount Change

**Total Adjustment Amount Change** = Total Adjusted Salaries - Total Current Salaries

**Total Merit Amount Change** = Sum of Change Amount for all rows in grid * 12

**Total Adjustment Pct Change** = Total Adjustment Amount Change/Total Current Salaries

**Total Merit Pct Change** = Total Merit Amount Change / [(Sum of Annual Rt for rows that do have a Merit Increase but no Adjustment) + (Sum of Adjusted Annual Rt for rows that have Merit Increase and an Adjustment)] * 100
Page Layout

Select tabs to view the Salary Planning data depending on the driving factor used for the adjustment or merit change. Each tab will display fields of information corresponding to the tab’s heading.

To view all fields at one time, select All Fields tab.

EXTENDING FACULTY POSITION END DATE

The first tab in the Sal Adj and Merit Inc Fac Med panel, “Position” allows you to extend a faculty position end date.

To extend Faculty position end date, go to the New Posn End Dt field and type in the new position end date, using the following date format:

mm/dd/yyyy - 04/30/2009

If the new position end date is indefinite, click the checkbox marked New Posn Indef End.

Posn End Dt (or New Posn End Dt) must be equal to or greater than the New Appt End date. (See Reappointments Tab)

You do not need to save until you are done with your Adjustment and Merit Increases on the other tabs.
Salary Adjustment – FACULTY Applying Approval

Before the Salary adjustments or Merit Increases are entered an appropriate approval must be applied.

Verify the name of the individual to whom you will be giving a salary readjustment

Tab to the field marked Adjust Appr.

Pull down the arrow and choose the appropriate approval level:
P – Planning,
D – Departments,
N – No Entry,
R – Rejected, or
S - School.

OR:

Use the Mass Adj Approval feature if you would like to apply the approval action to all employees on the page.

Remember – if you have multiple pages of employees, this feature will apply the approval to all employees not just the current page you are viewing. Look at your scroll bar, if there are multiple pages, click the view all link and to confirm you would like to apply this approval level to everyone.
## Entering Salary Adjustments for Med Faculty

Select the Adjustments Tab to enter salary adjustments for faculty.

Please note: There are four ways to enter Salary Adjustments on this Tab by entering the Adj Pct Change, Adj Dollar Change, Adj Comp Rate or Adj Annual Rate.

### Adjustment Percent Change

* Enter the total Percent of Adjustment.
** This field accepts positive and negative values.

By pressing tab after entering the percent adjustment, the *Adjust Dollar Change*, the *Adj Comp Rate* and *Adj Annual Rate* will be automatically updated to reflect the increase.

The data enterable field for Adj FTE must also be entered before you save. Detailed instructions can be found later in this section.

Please note: The salary adjustment can also be entered by Adj Dollar Change, Adj Comp Rate and Adj Annual Rate from this tab.

### OR
### Adjust Dollar Change

Enter the total amount of Salary increase or decrease for the individual is expressed as a dollar amount.

*Ex: Enter -1000 to give an employee a decrease of $1000.00 per month.*

By pressing tab after entering the dollar increase/decrease, the *Adj Comp Rt*, *Adj Annual Rate*, and *Adj Pct Change* fields will be automatically updated to reflect the increase.

The data enterable field for *New FTE Salary* must also be entered.

<table>
<thead>
<tr>
<th>EmpID</th>
<th>EmpID Rct Nbr</th>
<th>EmpID Rct Nbr</th>
<th>EmpID Rct Nbr</th>
<th>EmpID Rct Nbr</th>
<th>EmpID Rct Nbr</th>
<th>EmpID Rct Nbr</th>
<th>EmpID Rct Nbr</th>
</tr>
</thead>
<tbody>
<tr>
<td>1061090</td>
<td>0</td>
<td>8,480,340,000</td>
<td>101,764.08</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1021098</td>
<td>0</td>
<td>3,410,000,000</td>
<td>40,920.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1059841</td>
<td>0</td>
<td>6,888,000,000</td>
<td>80,340.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1056907</td>
<td>0</td>
<td>21,042,330,000</td>
<td>259,708.96</td>
<td>-4.62</td>
<td>-1,000.00</td>
<td>20,642.33</td>
<td>247,708.96</td>
</tr>
<tr>
<td>1059800</td>
<td>0</td>
<td>6,250,000,000</td>
<td>75,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### OR

### Adjust Comp Rate

Enter the total amount of increase or decrease for the individual expressed as an adj monthly compensation rate in dollars.

*Ex: Enter 3,000 to give an employee an adjusted monthly compensation rate of $3,000.*

By pressing tab after entering an adj compensation rate, *Adj Pct Change*, *Adj Dollar Change* and *Adj Annual Rate* will be automatically updated to reflect the increase.

The data enterable field for *Adj FTE Salary* must also be entered.

<table>
<thead>
<tr>
<th>EmpID</th>
<th>Comp Rct</th>
<th>Adj Pct Change</th>
<th>Adj Dollar Change</th>
<th>Adj Comp Rate</th>
<th>Adj Annual Rate</th>
<th>Annual FTE Rt</th>
<th>Adj FTE Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>8,500,000,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>78,000.00</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>8,480,340,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>101,764.08</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>6,888,000,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80,340.00</td>
<td></td>
</tr>
<tr>
<td>0.11</td>
<td>399,000,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>136,788.00</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>2,171,250,000</td>
<td>36.17</td>
<td>820.75</td>
<td>3,000.00</td>
<td>36,000.00</td>
<td>26,055.00</td>
<td></td>
</tr>
</tbody>
</table>
**Adjust Annual Rate**

Enter the total amount of increase/decrease for the individual expressed as a adjusted annual rate in dollars

Ex: Enter **72,000** to give an employee an adjusted annual Compensation rate of $72,000

By pressing tab after entering a new annual rate, *Adj Pct Change*, *Adj Pct Change*, and *Adj Dollar Change* will be automatically updated to reflect the increase.

The Adjusted Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid monthly.

The data enterable field for *New FTE Salary* must also be entered.

<table>
<thead>
<tr>
<th>Enroll Rcl Nbr</th>
<th>Annual Rl</th>
<th>Adj Pct Change</th>
<th>Adjust Dollar Change</th>
<th>Adj Comp Rate</th>
<th>Adj Annual Rate</th>
<th>Annual FTE Rt</th>
<th>Adj FTE Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>78,000.00</td>
<td>-7.98</td>
<td>-500.00</td>
<td>6,000.00</td>
<td>72,000.00</td>
<td>78,000.00</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>101,784.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>101,784.00</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>80,340.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80,340.00</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>136,788.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>136,788.00</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>26,055.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>26,055.00</td>
<td></td>
</tr>
</tbody>
</table>
### Entering Adjusted Full Time Equivalent for Faculty

Tab to the Adj FTE field is located on the Adjustments Tab or All Fields Tab.

Enter in the adjusted Full Time Equivalent Salary based upon your School’s calculation for FTE.

**Formula:**

\[
\text{Adj FTE} = \frac{\text{monthly compensation rate} \times 12}{\text{percent full time}}
\]

**Example at 100% Full Time:**

\[
($4,150 \times 12) / 100\% = $49,800
\]

**Example at 50% Full Time:**

\[
($3,000 \times 12) / 50\% = $72,000
\]

The Adj FTE on this page is figured as the FTE Salary per appointment or job.

<table>
<thead>
<tr>
<th>Adjustment</th>
<th>Annual RT</th>
<th>Adj Pct Change</th>
<th>Adj Dollar Change</th>
<th>Adj Comp Rate</th>
<th>Adj Annual Rate</th>
<th>Adj FTE RT</th>
<th>Adj FTE Salary</th>
<th>Pct FT</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>78,000.00</td>
<td>-7.89</td>
<td>-500.00</td>
<td>6,000.00</td>
<td>72,000.00</td>
<td>78,000.00</td>
<td>72,000.00</td>
<td>100.00</td>
</tr>
<tr>
<td>0</td>
<td>101,764.08</td>
<td>4.00</td>
<td>359.21</td>
<td>8,819.65</td>
<td>105,834.00</td>
<td>101,764.08</td>
<td>105,834.00</td>
<td>100.00</td>
</tr>
<tr>
<td>0</td>
<td>80,340.00</td>
<td>-3.00</td>
<td>-200.00</td>
<td>6,494.15</td>
<td>77,928.00</td>
<td>80,340.00</td>
<td>77,928.00</td>
<td>100.00</td>
</tr>
<tr>
<td>0</td>
<td>136,788.00</td>
<td>5.00</td>
<td>569.95</td>
<td>11,968.95</td>
<td>143,627.89</td>
<td>136,788.00</td>
<td>170,955.84</td>
<td>84.00</td>
</tr>
<tr>
<td>1</td>
<td>26,065.00</td>
<td>3.20</td>
<td>89.48</td>
<td>2,240.73</td>
<td>26,888.78</td>
<td>26,065.00</td>
<td>188,054.00</td>
<td>16.00</td>
</tr>
</tbody>
</table>

Optional: Enter Adjusted Percent Full Time

The Adj Percent Full Time field is located on All Fields tab and is data-enterable.

This is an optional field that departments have the ability to update.

If necessary, enter the Adjusted Percent Full Time.

You may Save your Adjustment changes by Click the Save button.

Or you can continue on to enter your Merit Increases (if applicable) on the Merit Increase Tab.
Entering Merit Increase for Med Faculty

Merit Increases for Med Faculty may be done in one of four ways - by entering a percent value for the increase, a dollar value for the increase, a new monthly compensation rate, or a new annual rate.

*If you are also doing Adjustments to an employee that must be entered before the merit increase. If a merit increase has already been entered for the employee the Salary Adjustment section for the employee will not be allowed.

The merit increase will calculate based on what was entered (or not entered) in the Adjustments tab.

Select the tabs labeled “Merit” to enter merit increases.

To view all fields at one time, select All Fields tab.

Merit by SAU-FACULTY Applying Approval

Before the Merit Increases are entered an appropriate approval must be applied.

Verify the name of the individual to whom you will be giving a salary readjustment

Tab to the field marked Merit Appr.

Pull down the arrow and choose the appropriate approval level:
P – Planning,
D – Departments,
N – No Entry,
R – Rejected, or
S - School.

OR:
Use the Mass Merit Approval feature if you would like to apply the approval action to all employees on the page.

Remember – if you have multiple
pages of employees, this feature will apply the approval to all employees not just the current page you are viewing. Look at your scroll bar, if there are multiple pages, click the view all link and to confirm you would like to apply this approval level to everyone.

**Merit by Percent Increase**

Enter the total Percent of Merit Increase for the individual using the following format:

4.5 for 4.50

After the Pct Incr is entered, tab once and $ Incr, New Comp Rt and New Ann Rt will be automatically updated to reflect the increase.

The data enterable field for New FTE Salary must also be entered.

Notice the Salary Adjustment amounts will reflect in the Merit Increase section.

The merit increase entered will be calculated from the Salary Adjustments amounts (if entered).

OR
**Merit by Dollar Increase**

Enter the total amount of Merit Increase for the individual expressed as a dollar amount.

*Ex: Enter 1000 to give an employee an additional $1000.00 per month.*

After the $ Incr is entered, tab once and Pct Incr, New Comp Rt, and New Annl Rt, will be automatically updated to reflect the increase.

The data enterable field for *New FTE Salary* must also be entered.

<table>
<thead>
<tr>
<th>Comp Rt</th>
<th>Annual Rt</th>
<th>Pct Inc</th>
<th>$ Incr</th>
<th>Change Amount</th>
<th>New Comp Rt</th>
<th>New Annl Rt</th>
<th>New FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,600,000.00</td>
<td>78,000.00</td>
<td>15.38</td>
<td>1,000.00</td>
<td>1,000,000.00</td>
<td>7,600.00</td>
<td>90,000.00</td>
<td>90,000.00</td>
</tr>
<tr>
<td>8,490,340.00</td>
<td>101,784.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6,695,000.00</td>
<td>80,340.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11,339,000.00</td>
<td>138,788.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2,171,250.00</td>
<td>26,055.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**OR**

**Merit by New Compensation Rate**

Enter the total amount of Merit Increase for the individual expressed as a new monthly compensation rate in dollars.

*Ex: Enter 3000 to give an employee a monthly compensation rate of $3000.*

After the New Comp Rt is entered, tab once and Pct Incr, $ Incr, and New Annl Rt, will be automatically updated to reflect the increase.

The data enterable field for *New FTE Salary* must also be entered.

<table>
<thead>
<tr>
<th>Comp Rt</th>
<th>Annual Rt</th>
<th>Pct Inc</th>
<th>$ Incr</th>
<th>Change Amount</th>
<th>New Comp Rt</th>
<th>New Annl Rt</th>
<th>New FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>6,600,000.00</td>
<td>78,000.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8,490,340.00</td>
<td>101,784.00</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2,171,250.00</td>
<td>26,055.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Merit by New Annual Rate

Enter the total amount of Merit Increase for the individual expressed as a new annual rate in dollars

Ex: Enter 95000 to give an employee an annual compensation rate of $95,000.

After the New Annl Rt is entered, tab once and Pct Inc, $ Incr, and New Comp Rt will be automatically updated to reflect the increase.

The New Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid monthly.

The data enterable field for New FTE Salary must also be entered.
## Entering New Full Time Equivalent Salary for Faculty

Tab to the *New FTE Sal* field.

Enter in the new Full Time Equivalent Salary based upon your School's calculation for FTE.

**Formula:**
New FTE Sal = monthly compensation rate x 12 divided by percent full time.

**Example at 100% Full Time:**
($4,150 x 12) / 100% = $49,800

**Example at 50% Full Time:**
($3,000 x 12) / 50% = $72,000

The FTE Salary on this page is figured as the FTE Salary per appointment or job.

<table>
<thead>
<tr>
<th>Pct Inc</th>
<th>$ Inc</th>
<th>Change Amount</th>
<th>New Comp R</th>
<th>New Ann R</th>
<th>New FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.25</td>
<td>1,221.67</td>
<td>1,221,67000</td>
<td>7,915.67</td>
<td>95,000.04</td>
<td>95,000.00</td>
</tr>
</tbody>
</table>
Viewing New Contract Period for Faculty

To view Contract Period or new Contract Period for faculty on the Sal Adj on the Merit by SAU – Faculty page.

Select the Merit or All Fields tab.

The Contract Period fields are displayed at far-right side of the page.

The new Contract Period will be entered centralized at the Medical School. Departments will not enter new contract period.

This new value will load into HRIS with the Merit Increase data in August.
Salary Adjustment Amounts Reflected in Merit Increases-All Fields Tab

In order to view an employee’s Salary Adjustment with their Merit Increase you need to select the “All Fields” tab.

The merit increase entered will be calculated from the Salary Adjustment amounts entered previously.

Ex. Adj Comp Rate 6,305.00

$Incr 157.63

New Comp Rate 6,462.63
Reappointment Med Faculty

The Reappointment Med Faculty tab is used for the viewing and data entry of reappointment information for Faculty.

The Reappointment data entry for the Med Faculty will be kept centralized at Medical Administration. Departments will not enter reappointments into this panel. The panel will be available on in a view only format for Medical School Department Users.

REAPPOINTMENT FACULTY – Viewing Information

Logon to HRIS
  • Compensation
  • Base Compensation
  • Merit Increases
  • Sal Adj and Mer Inc

The Search page will be displayed.

Enter the Salary Administration Unit or Salary Plan that you would like to view

Click Search.

A list of the SAUs and Salary Plans within the search criteria will appear in the Results box.
Select the “Reappointment” tab.

You will be able to view your Faculty current Appt End Dts.

Any changes to Med Faculty Appointment End Dates will be made centrally through Medical Administration.
Promotion Med Faculty

The Promotion Faculty page is used for the viewing and data entry of promotion information for Faculty.

The Promotion data entry for the Med Faculty will be kept centralized at Medical Administration. Departments will not enter the promotions into this panel. The panel will be available on in a view only format for Medical School Department Users.

PROMOTION FACULTY - Viewing Information

Logon to HRIS
- Compensation
- Base Compensation
- Merit Increases
- Sal Adj and Mer Inc

The Search page will be displayed.

Enter the Salary Administration Unit or the Salary Plan that you would like to view.

Click Search.

Select the “Promotion” tab.

You will only be able to view your current Faculty job code and Title.

Any promotions for Med Faculty will be made centrally through Medical Administration and the Provost Office.
Using the *Merit by Empl Faculty – Med* panel

The *Merit by Empl Faculty – Med* panel is used to enter a salary adjustment and merit increase on one page by employee. This panel is only available to the Medical School. The *Merit by Empl Faculty – Med* page allows data entry for only one individual at a time.

**Rules:**
1. This panel is for Medical School faculty only
2. Salary adjustments should be entered before a merit increase. If a merit increase has already been entered for the employee, the Salary adjustment will not be allowed.
3. Negative amounts will be accepted in the adjustment fields
4. Approved or pending adjustments will be reflected in the Merit Increase section of the “Merit by Empl Faculty – Med” and Salary Adj and Merit Inc by SAU – Faculty MED panel.

**MERIT BY EMPL FACULTY – MED** panel

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- **Merit by Empl Faculty - Med**

The Search page will be displayed.

Enter the **Name** or **Employee ID** of the Faculty member you would like to view.

You can also choose to view information using the **NW Salary Admin Unit** or the **Salary Administration Plan** criteria.

Click Search.

A list of the employees within the search criteria will appear alphabetically in the Results box. Select the employee that you would like to view by clicking on the line.
**MERIT BY EMPL FACULTY - MED Applying Approval**

Before the Salary Adjustment is entered, an appropriate approval must be applied.

Tab to the field marked *Adj Appr*.

Pull down the arrow and choose the appropriate approval level:
- **D** – Departments,
- **P** – Planning,
- **N** – No Entry
- **R** – Rejected, or
- **S** – School.

**Note:** If you do not want to enter a Salary Adjustment for an employee, skip this section and proceed to the Merit Increase section.
MERIT BY EMPL FACULTY - MED Salary Adjustment

Salary Adjustments for Medical School Faculty may be done in one of four ways - by entering a percent change, a dollar amount change, an adjusted monthly compensation rate, or an adjusted annual rate.

Remember, the Salary Adjustment must be entered before the Merit Increase and negative values are accepted in the adjustment fields.

**Salary Adjustment by Percent Change.**

Tab to the field marked *Adj Pct Change*. Enter a negative or positive value into the Adj Pct Change field.

Once the Pct Change is entered, tab once and Adj $ Incr, Adj Comp Rt, and Adj Annl Rt will be automatically updated to reflect the change.

**Save**

Click the Save button.

OR
### Salary Adjustment by Adjusted Dollar Change

Tab to the field marked *Adj $ Change*.

Enter the total amount of Increase/Decrease for the individual expressed as a dollar amount.

**Ex:** Enter *-1000* to give an employee a decrease of $1000 per month.

After the *Adj $ Change* is entered, tab once and *Adj Pct Incr*, *Adj Comp Rt*, and *Adj Annl Rt*, will be automatically updated to reflect the increase.

<table>
<thead>
<tr>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the Save button.</td>
</tr>
</tbody>
</table>

**OR**
Salary Adjustment by Adjusted Compensation Rate

Tab to the field marked *Adj Comp Rt*.

Enter the Salary Adjustment amount for the individual expressed as an adjusted monthly compensation rate in dollars.

**Ex:** Enter 2300 to give an employee an adjusted monthly compensation rate of $2,300.

After the *Adj Comp Rt* is entered, tab once and *Pct Change*, *$ Change*, and *Adj Annl Rt*, will be automatically updated to reflect the increase.

**Save**

Click the Save button.

**OR**
Salary Adjustment by Adjusted Annual Rate

Tab to the field marked **Adj Annl Rt**.

Enter the Salary Adjustment amount for the individual expressed as an adjusted Annual compensation rate in dollars.

Ex: Enter 18,000 to give an employee an adjusted annual compensation rate of $18,000.

After the *Adj Annl Rt* is entered, tab once and *Pct Change*, *$ Change*, and *Adj Comp Rt*, will be automatically updated to reflect the increase.

**Save**

Click the Save button.
**Entering Adjusted Full Time Equivalent for Faculty**

Enter in the adjusted Full Time Equivalent Salary based upon your School's calculation for FTE into the Adj FTE Sal field.

**Formula:**
Adj FTE = monthly compensation rate x 12 divided by percent full time.

**Example at 100% Full Time:**
($4,150 x 12) / 100% = $49,800

**Example at 50% Full Time:**
($3,000 x 12) / 50% = $72,000

The Adj FTE on this page is figured as the FTE Salary per appointment or job.

**Optional: Enter Adjusted Percent Full Time**

The Adj Percent Full Time field is located on All Fields tab and is data-enterable.

This is an optional field that departments have the ability to update.

If necessary, enter the Adjusted Percent Full Time.

Click the Save button.
Notice the Salary Adjustment amounts will reflect in the Merit Increase section.

The merit increase entered will be calculated from the Salary Adjustment amounts.
MERIT BY EMPL FACULTY - MED Merit Increase

Merit Increases for Faculty may be done in one of four ways - by entering a percent value for the increase, a dollar value for the increase, a new monthly compensation rate, or a new annual rate.

Merit Increase by Percent Increase

Tab to the field marked Pct Incr.

Enter the total Percent of Merit Increase for the individual using the following format:

Ex: Enter 3.25 for a 3.25% Increase

After the Pct Incr is entered, tab once and $ Incr, New Comp Rt, and New Annl Rt will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

Save

Click the Save button.

OR
**Merit Increase by Dollar Increase**

Tab to the field marked \$ **Incr**.

Enter the total amount of Merit Increase for the individual expressed as a dollar amount.

Ex: Enter 100 to give an employee an additional $100.00 per month.

After the \$ **Incr** is entered, tab once and **Pct Incr**, **New Comp Rt**, and **New Annl Rt**, will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

**Save**

Click the Save button.

**OR**
Merit Increase: New Compensation Rate
Tab to the field marked New Comp Rt.

Enter the total amount of Merit Increase for the individual expressed as a new monthly compensation rate in dollars.

Ex: Enter 1550 to give an employee a monthly Compensation rate of $1,550.

After the New Comp Rt is entered, tab once and Pct Incr, $ Incr, and New Annl Rt, will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

Save

Click the Save button.

OR
Merit Increase by Entering New Annual Rate

Tab to the field marked **New Annl Rt**.

Enter the total amount of Merit Increase for the individual expressed as a new annual rate in dollars.

Ex: Enter **19000** to give an employee an annual compensation rate of $19,000.

After the **New Annl Rt** is entered, tab once and **Pct Inc**, **$ Incr**, and **New Comp Rt** will be automatically updated to reflect the increase.

The New Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid monthly.

Tab over to the comment field to add a comment. There is a 30-characters maximum on this field.

**Save**

Click the Save button.
New FTE Salary

Tab to the field marked *New FTE Sal.*

Enter in the new Full Time Equivalent Salary based upon your School’s calculation for FTE.

**Formula:**

\[
\text{New FTE Sal} = \text{New Comp Rt} \times 12 \div \text{percent full time}
\]

**Example at 100% Full Time:**

\[\frac{($4,150 \times 12)}{100\%} = $49,800\]

**Example at 50% Full Time:**

\[\frac{($3,000 \times 12)}{50\%} = $72,000\]

The FTE Salary on this page is figured as the FTE Salary per appointment or job.
New Contract Period

Contract Period is a view only field. Changes are made by Medical Administration upon request.

MERIT BY EMP FACULTY – MED panel: Reappointment and Promotion Section

The Reappointment and Promotion entries will be kept centralized and departments will not enter the reappointments and promotion into this panel.
Appendix

A. Error Messages

B. Staff Checklist

C. Faculty Checklist

D. Resave & Customize Queries
Appendix A: Possible Error Messages

When bringing up the Merit by SAU - Staff panel using an invalid NW Salary Admin Unit or invalid Salary Administration Plan, the error message "No Matching Values were found" will appear at the bottom of the dialog box.

If you change the New Appointment End Date to Indefinite, and if the New Posn Indef End is not indefinite, then you will see the error message that appears to the right.

Click OK, and enter the appropriate information.

If you enter a Performance Evaluation rating (Eval) which does not follow the proper format, you will see the message that appears on the right.

Click OK and enter the Eval using the correct format: X.XX.
If you try to exit this panel without saving changes, you will be prompted with the message that appears on the right.

To save the panel, click Yes. Or hit Enter.

If you enter a New Comp Rt that is less than the current Comp Rt, you will be prompted with the message that appears on the right.

Click OK, and enter the appropriate New Comp Rt.

If you enter a New Annl Rt that is less than the current Comp Rt, you will be prompted with the message that appears on the right.

Click OK, and enter the appropriate New Annl Rt.

If you enter a New Annl Rt or a New Comp Rt that results in a merit increase greater than 99.99%, you will be prompted with the message that appears on the right.

Click OK, and enter the appropriate New Annl Rt or New Comp Rt.
<table>
<thead>
<tr>
<th>If you enter a dollar increase ($ Incr) that is either greater than 10,000 or greater than 100% of the current Comp Rt, the error message to the right will appear.</th>
<th><img src="image1.png" alt="Microsoft Internet Explorer" /> Amount can not be greater than 10,000 or greater than 100% of comp rate Navigate to the previous level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click OK, and enter the appropriate merit increase.</td>
<td><img src="image2.png" alt="Microsoft Internet Explorer" /> Warning – Merit Approval code must be assigned if data entry has taken place. OK Cancel</td>
</tr>
<tr>
<td>If you exit the panel without applying an approval level, the error message to the right will appear.</td>
<td><img src="image3.png" alt="Microsoft Internet Explorer" /> New appointment end date must be greater than appointment end date (2003, 1) The new appointment end date entered must be greater than the existing appointment end date. OK</td>
</tr>
<tr>
<td>Click OK and enter the appropriate approval level.</td>
<td><img src="image4.png" alt="Microsoft Internet Explorer" /></td>
</tr>
<tr>
<td>If you enter a New Appt End Dt. that is less than the current Appt End Dt, the error message to the right will appear.</td>
<td><img src="image5.png" alt="Microsoft Internet Explorer" /></td>
</tr>
<tr>
<td>Click OK and enter the appropriate New Appt End Dt.</td>
<td><img src="image6.png" alt="Microsoft Internet Explorer" /></td>
</tr>
<tr>
<td><strong>Save</strong></td>
<td><img src="image7.png" alt="Save" /> Save the panel.</td>
</tr>
</tbody>
</table>
Appendix B: Staff Checklist

Use this checklist to guide you as you verify the information entered into the salary planning panels. Use the queries listed to check each point.

<table>
<thead>
<tr>
<th>Pre-Load Tasks</th>
<th>Original Query Name(s) in REPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify employees whose merit increases have been entered and either approved or rejected.</td>
<td>SAU_STAFF_ALL_EES_WITH_INCR (multiple SAUs)</td>
</tr>
<tr>
<td></td>
<td><strong>OR</strong></td>
</tr>
<tr>
<td></td>
<td>SAU_STAFF_ALL_EES_W_INCR_1_SAU (single SAU)</td>
</tr>
<tr>
<td>2. Identify employees with pending merit increase entry.</td>
<td>SAU_STAFF_EES_WITH_NO_ENTRY (multiple SAUs)</td>
</tr>
<tr>
<td></td>
<td><strong>OR</strong></td>
</tr>
<tr>
<td></td>
<td>SAU_STAFF_EES_W_NO_ENTRY_1_SAU (Single SAU)</td>
</tr>
<tr>
<td>3. Identify employees whose merit increases do not yet show administrative approval (A, approval).</td>
<td>SAU_STAFF_INCRS_NOT_APPR (multiple SAUs)</td>
</tr>
<tr>
<td></td>
<td><strong>OR</strong></td>
</tr>
<tr>
<td></td>
<td>SAU_STAFF_INCRS_NOT_APPR_1_SAU (Single SAU)</td>
</tr>
<tr>
<td>4. Double check all merit increase data entry.</td>
<td>SAU_STAFF_INFO_ALL_MERIT_DATA</td>
</tr>
<tr>
<td></td>
<td><strong>OR</strong></td>
</tr>
<tr>
<td></td>
<td>SAU_INFO_ON_3_PANELS</td>
</tr>
<tr>
<td>5. Identify employees with new appointment end dates.</td>
<td>SAU_ALL_END_DATE_CHANGES</td>
</tr>
<tr>
<td>6. Identify employees with current appointment end dates less than September 1. These individuals need to have the appointment end date extended before the load.</td>
<td>SAU_JOB_END_DATE</td>
</tr>
<tr>
<td>7. Identify employees whose position end date is less than new appointment end date</td>
<td>SAU_POSITION_END_DATE</td>
</tr>
<tr>
<td>8. Identify employees with an extension of new position end date.</td>
<td>SAU_NEW_POS_END_DATE</td>
</tr>
<tr>
<td>9. Identify employees with an extension of new appointment end date.</td>
<td>SAU_NEW_APPT_END_DATE_STAFF</td>
</tr>
<tr>
<td>Post-Load Tasks</td>
<td>Original Query Name(s)</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------</td>
<td>----------------------------------------------</td>
</tr>
<tr>
<td>1. Identify all non-exempt employees with 8/21/2011 effective dated merit increases.</td>
<td>SAU_MRIT_INCRS_ONJOB_STAFF</td>
</tr>
<tr>
<td>2. Identify all exempt employees with a 9/1/2011 effective dated merit increases.</td>
<td>SAU_MRIT_INCRS_ONJOB_AFTR_LOAD</td>
</tr>
</tbody>
</table>
## Appendix C: Faculty Checklist

Use this checklist to guide you as you verify the information entered into the salary planning pages. Use the queries listed to check each point.

<table>
<thead>
<tr>
<th>Pre-Load Tasks</th>
<th>Original Query Name(s) in REPT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify faculty employees whose merit increases have been entered and either approved or rejected.</td>
<td>SAU_FAC_ALL_EES_WITH_INCR (multiple SAUs)</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>SAU_FAC_ALL_EES_W_INCR_1_SAU (single SAU)</td>
</tr>
<tr>
<td>2. Identify faculty employees with pending merit increase entry.</td>
<td>SAU_FAC_EMPS_WITH_NO_ENTRY (multiple SAUs)</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>SAU_FAC_EMPS_W_NO_ENTRY_1_SAU (single SAU)</td>
</tr>
<tr>
<td>3. Identify faculty employees whose merit increases do not yet show administrative approval (A, approval).</td>
<td>SAU_FAC_INCRS_NOT_APPR (multiple SAUs)</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>2. SAU_FAC_INCRS_NOT_APPR_1_SAU (single SAU)</td>
</tr>
<tr>
<td>4. Double-check all merit increase data entry.</td>
<td>SAU_FAC_INFO_ALL_MERIT_DATA</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>SAU_INFO_ON_3_PANELS</td>
</tr>
<tr>
<td>5. Identify employees with new appointment end dates.</td>
<td>SAU_ALL_END_DATE_CHANGES</td>
</tr>
<tr>
<td>6. Identify employees with current appointment end dates less than September 1. These individuals need to have the appointment end date extended before the load.</td>
<td>SAU_JOB_END_DATE</td>
</tr>
<tr>
<td>7. Identify employees whose position end date is less than new appointment end date</td>
<td>SAU_POSITION_END_DATE</td>
</tr>
<tr>
<td>8. Identify employees with an extension of new position end date.</td>
<td>SAU_NEW_POS_END_DATE</td>
</tr>
<tr>
<td>9. Identify faculty employees with an extension of new appointment end date.</td>
<td>SAU_NEW_APPT_END_DATE_FACULTY</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Post-Load Tasks</th>
<th>Original Query Name(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Identify all faculty with a 9/1/2011 effective dated merit increase.</td>
<td>SAU_MRIT_INCRS_ONJOB_AFTR_LOAD</td>
</tr>
</tbody>
</table>
Appendix D: Resave & Customize Each Query

Please re-save each query so that you are not changing the query template HRIS has created for all users. When you re-save, you may then make the adjustments suggested below to customize each for your school or for particular departments. Follow this procedure for saving any of the queries listed as your own. This section also provides step-by-step instructions for making the following adjustments to a query so that you may pull the information you are looking for:

1. Making changes to the SAU(s) the query is pulling
2. Making changes to the Salary Administration Plan the query is pulling

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong> Log into the <strong>REPT</strong> database.</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Keep in mind that the **REPT** database gets refreshed with the data from **PROD** every evening.

From Main Menu, choose: **Reporting Tools - Query – Query Manager**
Step 2: Pull up the query you wish to resave.

Key either part of the query name or the entire query name in the blank box and click Search.

If you key only the first part of the query name, click search to see all Queries that begin with those letters. Refer to either Appendix A or C for a complete list of query names and their uses.

Step 3: Find the query within the list by keying as much of the query name as you wish.

When you find the query, click on the query line Edit hyperlink to open it.
Step 4: Re-Save the query

At the bottom of the screen, click on the Save As button.

Step 4a: Save the Query

The following screen will be displayed.

1. Change the Owner box from public to private.

2. In the Query Name field, change the name as follows:

   Start each query name with your initials, then key in the rest of the query name.

   Note: If adding your initials makes the query name too long, truncate it at the end by deleting as many letters as necessary.

3. Click on the OK button.

Enter a name to save this query as:

Query: MCD_SAU_ALL_END_DATE_CHANGE

Description: Changed App end dates 2005

Folder: 

Query Type: User

Owner: Private

Query Definition:

OK Cancel
## Making changes to SAU's and Salary Plans

<table>
<thead>
<tr>
<th>Step</th>
<th>Comments</th>
</tr>
</thead>
</table>
| **Step 1**: Changes to SAU's | Bring up the query as you saved it.  
Click on the Criteria Tab. |

![Query Interface](Image)

**Query Name**: MOD_SAU_ALL_EBS_WITH_INCREASE  
**Description**: EBS Winners (Many SAU) 2001

### Criteria Table

<table>
<thead>
<tr>
<th>Logical</th>
<th>Expression 1</th>
<th>Condition Type</th>
<th>Expression 2</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>A.EFFDT - Effective Date</td>
<td>Equal to</td>
<td>Current Date</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.NYM_SAL_ADMIN_UNIT - NYM Salary Admin Unit</td>
<td>In list</td>
<td>(2000000,2000000,2000000)</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.SAL_ADMIN_PLAN - Salary Administration Plan</td>
<td>Equal to</td>
<td>FAC</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.NYM_MERIT_APPROVAL - Multi Approval</td>
<td>Equal to</td>
<td>A</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>A.NYM_MERIT_APPROVAL - Multi Approval</td>
<td>Equal to</td>
<td>R1</td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>

![Query Interface](Image)
Step 2:

In the example on the right, the query is looking for SAUs 490000, 290000, and 4080000 and Salary Plan = FAC.

To Change the SAU, follow steps 3A or 3B.

To Change the Salary Plan, follow step 4.

Step 3a: To Change Salary Admin Unit's (SAU) Using 'In list'

(The in list operator finds fields having a value that matches one or more of the values in a list of defined values.)

NOTE: You may also specify a range of SAUs by using the Operator 'between' (The Between operator selects fields having a value that is between two specified values). See Step 3b for these instructions.

1. Click on the edit button next to the field you wish to change
2. The Edit Criteria Properties panel will be displayed.
Click on the magnifying glass icon

The following panel will be displayed:

Type in the SAU you wish to add and click the Add Value Button. Continue to add SAU’s until you are finished in the same way.

Click OK when you are finished.
**Step 3b: To Change Salary Admin Unit's (SAU) Using 'between'**

(The *between* operator selects fields having a value that is between two specified values.)

1. Click on the edit icon next the criteria you wish to edit.

2. When the Edit Criteria Properties Panel is displayed, change the Condition Type to Between.

3. Key the lower end of the SAU range you wish the query to use in the first Constant box.

4. Key the upper end of the SAU range you wish the query to use in the Constant 2 box.

5. Click on the OK button.
**Step 4:**

To Change Salary Admin Plan:

1. Click on the Criteria Tab of the query
2. Click on the Edit box next to the line for NW_ADMIN_PLAN

3. Change the Salary Admin Plan by either typing the new Plan in the Constant box.
### Query Name, Purpose, and Timing for Use

<table>
<thead>
<tr>
<th>Original Query Name</th>
<th>Purpose</th>
<th>Timing</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAU_ALL_EES_WITH_INCREASE</td>
<td>To determine employees for whom merit increases have been entered and approved for multiple SAUs. The query will pick up anyone whose merit increases have approval status either 'A' (Administrative Approval) or 'R' (Approval Rejected by Administration). The results of this query can be used to check for accuracy and completeness.</td>
<td>Run by the schools, Provost, and Compensation Staff after all data entry has been completed and approvals have been given by the Provost (Faculty) or Compensation (Staff).</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
<tr>
<td>SAU_ALL_EMPLOYEES_WITH_INCRS</td>
<td>To identify employees for whom merit increases have been entered and approved for 1 SAU. The query will pick up anyone whose merit increases have approval status either 'A' (Administrative Approval) or 'R' (Approval Rejected by Administration). The results of this query can be used to check for accuracy and completeness.</td>
<td>Run by the schools, Provost, and Compensation Staff after all data entry has been completed and approvals have been given by the Provost (Faculty) or Compensation (Staff).</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
<tr>
<td>SAU_ALL_END_DATE_CHANGES</td>
<td>This query will pick up all employees in Salary plan FAC for whom reappointments have been keyed on the Reappointment-Faculty panel.</td>
<td>This query should be run by the departments before reappointment, promotion, and merit increases are loaded. The output from this query will be used to validate that data entry has been completed for all those needing new appointment end dates (or new indefinite end dates).</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
</tbody>
</table>

*For step-by-step instructions on making changes to either the SAU or Salary Plan criteria, refer to Appendix D.*
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<tr>
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</tr>
</thead>
</table>
| SAU_EMPLOYEES_W_NO_ENTRY        | Identify employees with pending merit increases entry for 1 SAU. The query will pick up all employees on any of the following FASIS panels whose Merit Approval status is 'blank':  
  ▪ Merit by SAU – Staff  
  ▪ Merit by SAU – Faculty  
  ▪ Merit by Employee – Staff  
  ▪ Merit by Employee – Faculty  
A merit approval status of blank means that either the no data entry has been done yet for the employee or that the approval status has not been changed to either ‘S’ or ‘A’. | This query should be run by the schools on an as needed basis to monitor the overall Merit Increase Approval process and to assure that no employees are overlooked. | Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.* |
| SAU_EMPLOYEES_WITH_NO_ENTRY     | Identify employees with pending merit increase entry for a range of SAU’s. The query will pick up all employees on any of the following FASIS panels whose Merit Approval status is blank. (pending):  
  ▪ Merit by SAU – Staff  
  ▪ Merit by SAU – Faculty  
  ▪ Merit by Employee – Staff  
  ▪ Merit by Employee – Faculty  
A merit approval status of blank means that either the no data entry has been done yet for the employee or that the approval status has not been changed to either ‘S’ or ‘A’. | This query should be run by the schools on an as needed basis to monitor the overall Merit Increase Approval process and to assure that no employees are overlooked. | Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.* |

*For step-by-step instructions on making changes to either the SAU or Salary Plan criteria, refer to Appendix D.*
**Salary Planning Procedures**

**Queries**

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<tbody>
<tr>
<td>SAU_INCRS_NOT_APPROVED</td>
<td>Identify employees whose merit increases do not yet show administrative approval. The query will pick up all employees on any of the following FASIS panels: ▪ Merit by SAU – Staff ▪ Merit by SAU – Faculty ▪ Merit by Employee – Staff ▪ Merit by Employee – Faculty Whose Merit Approval Status is ‘S’ (School Approval), not ‘A’ (Admin Approval) or ‘R’ (Rejected Admin Approval).</td>
<td>This query should be run by the Schools, Provost, and Compensation Staff to see which employee increases have not been administratively approved within an SAU. Merit increases will not be loaded to Job until each one has the Approval Status of &quot;A&quot;.</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
<tr>
<td>SAU_INFO_ALL_MERIT_DATA</td>
<td>Query will display all the fields of data entered on the Merit Increase panels.</td>
<td>This query should be run by the departments to verify merit increase data entry.</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
<tr>
<td>SAU_INFO_ON_3_PANELS</td>
<td>This query will display all of the fields of data entered on the Merit Increase Panels and Reappointment Panel (FAC, LIB, ACS, ASC, EXC, EXS, ITS, NEX, UPD Salary Plans) and Promotion Panel (FAC, LIB, or ACS Salary Plans only).</td>
<td>This query should be run by the schools, Provost, and Compensation Staff to verify all data entry.</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
<tr>
<td>SAU_JOB_END_DATE</td>
<td>Identify employees with current appointment end dates less than September 1. These individuals need to have the appointment end date extended before the load.</td>
<td>This query should be run by the departments before reappointment, promotion and merit increases are loaded. The output from the query will be used to identify those for whom appointment end dates need to be extended. Without this extension, merit increases will not successfully process.</td>
<td>Review the SAUs and Salary Plan that have been used as query criteria and change one or both as appropriate.*</td>
</tr>
</tbody>
</table>

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<tbody>
<tr>
<td>SAU_MRIT_INCRS_ONJOB_AFTR_LOAD</td>
<td>This query will be run after the load of merit increase data into FASIS tables and should be used as a comparison tool. It will identify employees who have a Pay Rate change row with an effective date of 9/1 (exempts). The results of this query should be compared to those obtained from running the query(s) to identify those employees for whom merit increases have been entered and approved. (These original query names are SAU_ALL_EES_WITH_INCR and SAU_ALL_EMPLOYEES_WITH_INCR). Any data from either of these queries that brings back a Merit Approval Code of ‘R’ will not appear on this current query.</td>
<td>This query is run by the schools, Provost, and Compensation Staff after the information is keyed into the Merit Increase panels has been loaded into the Job and Position Data tables.</td>
<td>Each time the report is run, it will be necessary to review the Salary Plan used the last time and change it if needed. The following Salary Plans have a 9/1 Effective Date of Increase: ACS – Academic Staff ASC – Academic Administrators EXC – Executive Level Staff EXS – Exempt Staff FAC – Faculty ITS – IT Staff LIB – Librarians RES- Research Staff REF- Research Faculty</td>
</tr>
<tr>
<td>SAU_MRIT_INCRS_ONJOB_STAFF</td>
<td>This query will be run after the load of merit increase data into FASIS tables and should be used as a comparison tool. It will identify employees who have a Pay Rate change row with an effective date of 8/19 (non-exempts). The results of this query should be compared to those obtained from running the query(s) to identify those employees for whom merit increases have been entered and approved. (These original query names are SAU_ALL_EES_WITH_INCR and SAU_ALL_EMPLOYEES_WITH_INCR). Any data from either of these queries that brings back a Merit Approval Code of ‘R’ will not appear on this current query.</td>
<td>This query is run by the schools, Provost, and Compensation Staff after the information is keyed into the Merit Increase panels has been loaded into the Job and Position Data tables.</td>
<td>Each time the report is run, it will be necessary to review the Salary Plan used the last time and change it if needed. The following Salary Plans have a 8/19 effective date of Increase: NEX- Non-exempt Staff UPD- University Police Dept</td>
</tr>
</tbody>
</table>

*For step-by-step instructions on making changes to either the SAU or Salary Plan criteria, refer to Appendix D.*
<table>
<thead>
<tr>
<th>Salary Planning Procedures Queries</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SAU_POSITION_END_DATE</strong></td>
<td></td>
</tr>
<tr>
<td>queries that brings back a Merit Approval Code of ‘R’ will not appear on this current query.</td>
<td></td>
</tr>
<tr>
<td>This query will pick up all employees with a blank appointment end date field AND an unchecked appointment indefinite end date box. This query will catch appointments that have not been extended.</td>
<td>This query should be run by the departments before reappointment, promotion, and merit increases are loaded. The output from the query will be used to validate that data entry has been completed for all those needing new position end dates and/or appointment end dates.</td>
</tr>
<tr>
<td><strong>SAU_NEW_POS_END_DATE</strong></td>
<td></td>
</tr>
<tr>
<td>This query will pick up employees in the selected Salary Plans for whom New Position End Dates (or New Indefinite End Dates) have been keyed on the Faculty or Salary panel.</td>
<td>This query should be run by the departments before reappointment, promotion, and merit increases are loaded. The output from the query will be used to validate that data entry has been completed for all those needing new position end dates (or new indefinite position end dates).</td>
</tr>
<tr>
<td><strong>SAU_NEW_APPT_END_DATE_FACULTY</strong></td>
<td></td>
</tr>
<tr>
<td>This query will pick up all employees in Fac Salary Plans for whom New Appointment End Dates (or New Indefinite End Dates) have been keyed on the Faculty Panel.</td>
<td>This query should be run by the departments before reappointment, promotion and merit increases are loaded. The output from the query will be used to validate that data entry has been completed for all those needing new appointment end dates (or new indefinite appointment end dates).</td>
</tr>
<tr>
<td><strong>SAU_NEW_APPT_END_DATE_STAFF</strong></td>
<td></td>
</tr>
<tr>
<td>Identify staff with an extension of new appointment end date.</td>
<td>This query should be run by the departments before reappointment, promotion, and merit increases are loaded. The output from the query will be used to validate that data entry has been completed for all those needing new appointment end dates (or new indefinite appointment end dates).</td>
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</table>

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<th>Timing</th>
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</tr>
</thead>
<tbody>
<tr>
<td>SAU_SAL_PLAN12_TEMPLATE_EXS</td>
<td>This query will be used to obtain all the employees in one SAU by Sal Plan (EXS, ITS, or EXC). Once run the users would copy the results into the Templates for Exempt Staff.</td>
<td>This query would be run if the manager wanted to do their Salary Planning before May 21st.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
</tr>
<tr>
<td>SAU_SAL_PLAN12_TEMPLATE_EXS_AL</td>
<td>This query will be used to obtain all the employees in multiple SAUs by Sal Plan (EXS, ITS, or EXC). Once run the users would copy the results into the Templates for Exempt Staff.</td>
<td>This query would be run if the manager wanted to do their Salary Planning before May 21st.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
</tr>
<tr>
<td>SAU_SAL_PLAN_TEMPLATE_EXS</td>
<td>This query would be used to obtain all the data entered for Performance Evaluation, Scale, and Merit Percent Increase by a single SAU. Once run the users would copy the results into the Templates for Exempt Staff.</td>
<td>This query would be run after May 21st when the Staff panels are available.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
</tr>
<tr>
<td>SAU_SAL_PLAN_TEMPLATE_EXS_ALL</td>
<td>This query would be used to obtain all the data entered for Performance Evaluation, Scale, and Merit Percent Increase for multiple SAUs. Once run the users would copy the results into the Templates for Exempt Staff.</td>
<td>This query would be run after May 21st when the Staff panels are available.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
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<tbody>
<tr>
<td>SAU_SAL_PLAN12_TEMPLATE_NEX</td>
<td>This query will be used to obtain all the employees in one SAU by Sal Plan (NEX or UPD). Once run the users would copy the results into the Templates for Non-Exempt Staff.</td>
<td>This query would be run if the manager wanted to do their Salary Planning before May 21st.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
</tr>
<tr>
<td>SAU_SAL_PLAN12_TEMPLATE_NEX_AL</td>
<td>This query will be used to obtain all the employees in multiple SAUs by Sal Plan (NEX or UPD). Once run the users would copy the results into the Templates for Non-Exempt Staff.</td>
<td>This query would be run if the manager wanted to do their Salary Planning before May 21st.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
</tr>
<tr>
<td>SAU_SAL_PLAN_TEMPLATE_NEX</td>
<td>This query would be used to obtain all the data entered for Performance Evaluation, Scale, and Merit Percent Increase by a single SAU. Once run the users would copy the results into the Templates for Non-Exempt Staff.</td>
<td>This query would be run after May 21st. when the Staff panels are available.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
</tr>
<tr>
<td>SAU_SAL_PLAN_TEMPLATE_NEX_ALL</td>
<td>This query would be used to obtain all the data entered for Performance Evaluation, Scale, and Merit Percent Increase for multiple SAUs. Once run the users would copy the results into the Templates for Non-Exempt Staff.</td>
<td>This query would be run after May 21st. when the Staff panels are available.</td>
<td>The templates can be used for reviewing and modeling Salary Planning data outside of FASIS. All final data entry must be done in FASIS</td>
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