HRS201:
SALARY PLANNING FOR STAFF

Office of Human Resources
Chris Tondini, FASIS Trainer

SALARY PLANNING

▪ What is Staff Salary Planning?
  – Annual process to enter merit increases for employees in FASIS

▪ All entries are done in FASIS Administration

▪ Entry is based on Salary Administration Unit (SAU)
  – Your SAU is the 6-digit HR DeptID identifying the top-level department
    responsible for merit increases and salary entry

▪ You are responsible for merit increases and performance
  evaluations for anyone employed or hired as of April 30, 2015
Salary Planning - Staff & Faculty

Northwestern University, FASIS

**Salary Planning**

**Employees entering or leaving your department after May 1:**

- Terminated/Transfers Out will fall off your list overnight
- Incoming transferred employees will appear on your list and should review merit increase entered by old department
- Employees on an *unpaid* Leave of Absence are excluded from the Salary Planning process until they return to active and paid status
- New employees (hired on after May 1) are not eligible

**Salary Planning**

**Using Salary Planning in FASIS:**

- Access is approved after completion of training
- Log into FASIS Production using your FASIS Admin ID and password
  - https://hrweb.northwestern.edu/
- Navigate to: Compensation > Base Compensation > Merit Increases
In the compensation folder, choose “Base Compensation”.

The “Merit Increases” folder contains all faculty and staff planning pages you have access to.
STAFF MERIT INCREASES & PERFORMANCE EXCELLENCE

STAFF SALARY PLANNING

Determining Merit Increases:

1. Merit Pool
   - Merit Pool assigned to each Salary Administration Unit (SAU) is 3.5% of total salaries of active employees as of May 1, 2015
   - Always discuss with your department and school for available pool

2. Individual Performance
   - Year-end ratings on Performance Excellence evaluations

3. Current Pay Rate
   - Consider where the employee falls in the salary grade
   - Use the Quartiles and Salary Increase Recommendation Matrix as a guide
   - Staff members with the same year-end rating may not receive the same increase, due to current salary
### Staff Salary Planning

**Salary Increase Recommendation Matrix:**

<table>
<thead>
<tr>
<th>Performance Evaluation</th>
<th>Quartiles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Q1</td>
</tr>
<tr>
<td>1</td>
<td>0.00%</td>
</tr>
<tr>
<td>2</td>
<td>0.00%</td>
</tr>
<tr>
<td>3</td>
<td>2.75%</td>
</tr>
<tr>
<td>4</td>
<td>3.00%</td>
</tr>
<tr>
<td>5</td>
<td>3.50%</td>
</tr>
<tr>
<td>6</td>
<td>4.25%</td>
</tr>
<tr>
<td>7</td>
<td>6.25%</td>
</tr>
</tbody>
</table>

### Discretionary Increases

An additional discretionary increase may be provided (with or without merit) to any high-performing employee.

- An additional discretionary amount of 0.5% for each SAU is available for extra meritorious performance
- Consideration should be given to key/critical, high potential, high performing employees
- Justification must be provided in FASIS for each discretionary increase
- Compensation maintains final approval
- **Exempt Employees:** May be paid as a lump sum in September or as a recurring increase
- **Non-Exempt Employees:** Included in hourly rate
STAFF SALARY PLANNING

Discretionary Increase Payments

- **Exempt Employees**: May be paid as a lump sum in September or spread out into all 12 paychecks
- **Non-Exempt Employees**: Included in hourly rate and spread throughout the year

Rules for Salary and Performance Entry

- All employees receiving an increase must have completed a performance review & year-end rating
- Performance Rating on a 7-point scale; *whole numbers only*
- All salaries must be at or above the FY16 minimum for the salary grade
- Staff will be able to access merit letters in FASIS Self Service Portal beginning September 1, 2015
STAFF SALARY PLANNING

Timeline

• May 4: Salary Planning pages open in FASIS
• June 19: All year-end performance reviews due to HR
• June 19: All salary entries due; pages close
• September 1: Merit information available to employees in Self Service Portal
• September 1: New rates effective for all employees

OVERVIEW

Staff Salary Entry in FASIS:

▪ Group Entry by Salary Admin Unit:
  □ Merit by SAU – Staff

▪ Individual Entry by Staff Member:
  □ Merit by Employee – Staff
STAFF SALARY ENTRY
BY SAU

In the compensation folder, choose “Base Compensation”.

Planning Year 2015
Select “Merit by SAU – Staff”

Enter an SAU and/or Salary Plan, or leave blank.
Select an SAU/Sal Plan that you have access to administer.
A grid of all employees in that SAU/Salary Plan is displayed.

If your budget is different than the flat 3.5%, enter your specific Budgeted Merit $ Inc.
Clicking an employee’s EmplID displays past merit records for that employee.

If the employee has multiple merit years, use the arrow to scroll and view each year.
There are four tabs above the grid that control the data that is displayed.

Percent Increase tab view.
### Dollar Amount Tab View

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Salary</th>
<th>Hourly Rate</th>
<th>Hourly Rate $</th>
<th>Total Current Earnings</th>
<th>Total New Earnings</th>
<th>Total Earnings Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>John Doe</td>
<td>$50,000</td>
<td>$25</td>
<td>$25</td>
<td>$50,000</td>
<td>$51,000</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

### New Annual Rate Tab View

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Salary</th>
<th>Hourly Rate</th>
<th>Hourly Rate $</th>
<th>Total Current Earnings</th>
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</table>
All Fields tab view.

More information displayed on the All Fields menu.
Any tab allows merit entry, but the Perf Eval must be entered first.

Enter a Performance Evaluation in whole numbers 1-7 only.
After entering a Perf Eval and tabbing out of the field, the boxes for merit entry open.

Only one merit value (Percent, Annual Rate, or Comp Rate) needs to be entered.
After entering one value, such as Percent Increase, the other fields calculate automatically.

New rates are calculated automatically.
Enter Perf Eval and a Merit field for each employee.

At any time, click Recalculate to update the top header values.
Upon recalculation, the total fields update to reflect your most current entries.

Removing a Perf Evaluation is not allowed...
You are unable to save if an employee has a merit increase, but no Performance Evaluation.

You may modify merit and recalculate as often as you like before saving your final entries.
Navigate to other tabs to see additional information based on your merit entry.

When your entry is final for an employee, click the Approval icon.
Select “D” once the merit entry is complete, or “P” if you are still in the planning phase.

**APPROVAL CODES**

**Most common department-used codes:**

- **P** Planning
  
  Your discretion: Entry is in progress

- **D** Dept Approval
  
  You have finished all entry

**When no increase is provided for an employee:**

- **E** Evaluation Only
  
  Performance evaluation has been entered, but a merit increase has not been assigned to anyone in your department for economical reasons

- **Z** Zero Increase
  
  Merit is not granted due to poor performance

- **N** No Increase
  
  Merit is not granted due to another reason

**School and Administrative codes:**

- **S** School Approval
  
  School Level Approval

- **R** Rejected
  
  Merit has been rejected and must be re-evaluated

- **A** Administration Approval
  
  Final Approval by Provost, Compensation, or Feinberg Administration
To mass approve everyone in the grid, use the Mass Merit Approval field and click Approve.

You may also enter the letter “D” without selecting the lookup icon.
When using **Mass Merit Approval**, all employees in the SAU/Sal Plan are approved.

Click **Save** to save all entries.
If you are not ready to finalize your entries, you may save at any time. Entries will not be routed to your School or HR Compensation until you enter a Merit Approval of “D”.

Salary data can be downloaded to Excel by clicking the Grid icon above Dollar Amount.
Data downloaded to Excel appears as it did on the Salary entry page.
In the Compensation folder, choose **Base Compensation.**
Select **Merit by Employee – Staff**.

Enter a last name or ID number, or perform a blank search.
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Northwestern University, FASIS

Planning Year 2015

You may also search by SAU or Salary Plan to see a full list of employees.

Select the employee you which to view/enter merit for.
Like the “Merit by SAU” page, an **Evaluation** number must be entered first.

Upon entering the **Evaluation**, all other merit entry boxes open.
Enter the Merit Increase and, if appropriate, a Discretionary Increase & Comment.

Enter the Merit Approval code, and Save the entry.
QUESTIONS?

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