HRS203: myHR Salary Planning

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HR Operations | Office of Human Resources

Why Training?
Why Training?

- Required for new salary planning users
  - Gain access to myHR pages
  - Learn how to navigate pages and new FY19 functionality
  - Review salary planning deadlines and resources

New Users Request Access

4. Access Roles
   - Select any role (Administration, access requested). Required training must be completed before access is provided.

<table>
<thead>
<tr>
<th>Annual Salary Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark increase Entry</td>
</tr>
<tr>
<td>Enter annual merit information, including bonuses and reappointments if applicable.</td>
</tr>
<tr>
<td>Department Approver</td>
</tr>
<tr>
<td>Assign department-level approval for salary planning data entry.</td>
</tr>
<tr>
<td>School/College Approver</td>
</tr>
<tr>
<td>Assign school or central administration approval for salary planning data entry.</td>
</tr>
</tbody>
</table>

5. Department/Chartstring Security Access
   - Data access: list all EHR Id/Depth(s) that you need access to view/update data, list only the first 6 fields to receive access to all nodes in that depth. Add additional sheet if necessary.

<table>
<thead>
<tr>
<th>EHR Id/Depth</th>
<th>Department Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

   Graduate Student Record Access? Yes No
   - or copy Data Access Dept/ID from this existing user: ____________________________

6. Signatures & Approvals
   - I understand that any violation of this agreement is cause for immediate revocation of access, dismissal, or other disciplinary action.
   - Applicant’s Signature: ____________________________ Date: ____________________________
   - Department/Unit approver’s Signature: ____________________________ Date: ____________________________
   - Authorized School/Unit Administrator’s Signature: ____________________________ Date: ____________________________

Northwestern
What is Salary Planning?

Budget and Salary Planning
Position Management
Submit Merit Increases
Effective Dates

Budgetary Parameters
Reappointments, Promotions, Performance Management

FSM
Open: 5/4
Close: 6/13

Faculty/Staff
Open: 6/1*
Close: 7/11
*Pending budget

FY19 Salary
Sept 2018 – Aug 2019

Biweekly:
8/26/18
Monthly:
9/01/18

Northwestern
What is Salary Planning?

- What is Salary Planning?
  - The annual compensation process to enter merit increases and/or discretionary increase for staff in myHR
  - Entry of annual faculty promotions and reappointments

- All entries are done in myHR Administration
  - Merit may be entered by SAU or by Employee

<table>
<thead>
<tr>
<th>Sal Plan</th>
<th>Description</th>
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<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEX</td>
<td>Nonexempt Staff</td>
<td>FAC</td>
<td>Faculty</td>
</tr>
<tr>
<td>EXS</td>
<td>Exempt Staff</td>
<td>LIB</td>
<td>Librarians</td>
</tr>
<tr>
<td>ITS</td>
<td>Information Technology Staff</td>
<td>ACS</td>
<td>Academic Faculty</td>
</tr>
<tr>
<td>EXC</td>
<td>Executive Level Staff</td>
<td>RES</td>
<td>Research Staff</td>
</tr>
<tr>
<td></td>
<td></td>
<td>REF</td>
<td>Research Faculty</td>
</tr>
</tbody>
</table>
What is Salary Planning?

- Employees entering or leaving the department:
  - Terminated/transferred employee will fall off your compensation list overnight
  - Incoming department of transferred employee should review merit increase entered by old department
  - Employee on an unpaid leave of absence will be excluded from the compensation planning process until they return to active and paid status

Planning Dates and Approvers
Salary Planning Dates

Planning deadlines and approvals are different for employee populations:

Feinberg School of Medicine (FSM)
  — Final approval by Feinberg Administration
    • Open: 5/4
    • Close: 6/13

Non-FSM Faculty and Librarians
  — Final approval by Office of the Provost
    • 5/1 promotion & reappointments
    • Open: 6/1*
    • Close: 7/13

Staff (Including FSM Staff)
  — Final Approval by HR Compensation
    • Open: 6/1*
    • Close: 7/13

*Pending availability of budgets
myHR Merit Entry

Basic Overview

Planning
- Budget Parameters
- Performance Excellence

Merit FY2019
- Salary Adjustment
- Merit Increase
- Discretionary Increase

Approval
- Department level
- School level
- Rejection

Administration
- Final approval by HR Compensation, Office of Provost, or FSM Administration
myHR Examples

1. **FSM Research Faculty & Staff Merit Increase** (Slide#15-38)
   - Merit by SAU – REF
   - Merit by SAU – RES

2. **Faculty with Salary Adjustment** (Slide #39-71)
   - Merit by SAU – Faculty
   - Reappointment – Faculty
   - Promotion – Faculty

3. **Staff with Discretionary Increase** (Slide #72-105)
   - Merit by SAU – Staff
   - Merit by Employee – Staff

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1. **FSM Research Faculty & Staff**

   Merit by SAU – REF Faculty*
   Merit by SAU – RES Staff*

   *FSM users only
On either the MERIT BY SAU – RES STAFF or MERIT BY SAU – RES FACULTY pages, enter a Salary Admin Unit (SAU) and click “Search”.

Note: Research (RES) pages are for FSM users only.

Enter a Salary Admin Unit (SAU) and click “Search”. MERIT BY SAU pages can also be viewed by clicking “Advanced Search” to refine results.

Note: Results displayed are limited by myHR security access.
Select an SAU with the corresponding Department Name and Salary Administration Plan (Salary Plan). Note: Multiple Departments can be listed under the same SAU.

Enter the merit value for each employee in one of the five tabs. Only one merit value (% Increase, Dollar Amount, New Comp Rate, or New Annual Rate) is required; other fields will calculate automatically. 
Note: Tabbing (vs. clicking) between fields allows values to calculate properly.
Note: Select "View All" to ensure all staff are visible. Also, data can be sorted by clicking the column header.
To assist planning, data can be downloaded at any time to Excel. Click “Save” to save myHR data before downloading. Click the spreadsheet icon. 

Note: Ensure pop up blocker is off to download items.

Select the downloaded item. Data downloaded to Excel appears as it does on merit increase pages. Click “Enable Editing” to manipulate data. 

Note: Ensure pop up blocker is off to download items.
**Percent Increase Tab**

Enter merit value by percentage in the Merit % Increase column and “tab” to update. The New Annual Rate will calculate automatically.

**Dollar Amount Tab**

Enter merit value by dollar amount in the Merit $ Increase column and “tab” to update. The New Compensation Rate and Percent Increase will calculate automatically.
New Compensation Rate Tab
Enter merit value by dollar amount in the New Compensation Rate column and “tab” to update. The Percent Increase will calculate automatically.

New Annual Rate Tab
Submit merit value by dollar amount in the New Annual Rate column and “tab” to updated. The Percent Increase will calculate automatically.
All Fields Tab

Any merit value can be entered on the All Fields tab and more data is available to view (e.g. Percent full-time).

If merit values are entered, New FTE Salary is required and must be manually calculated. New FTE Salary = New Annual Salary / New Full-time Percent.

Note: % full time can be found on the “All Fields” tab.
If merit values are entered, New FTE Salary is required and must be manually calculated. New FTE Salary = New Annual Salary / New Full-time Percent. 

*Note: % full time can be found on the “All Fields” tab.*

Once all merit data has been entered, data must be submitted using the appropriate **Merit Approval Code** to be routed for Administration approval. An error message will appear if entries do not have a Merit Approval Code assigned.
Enter the Merit Approval Code for each employee. Click the Merit Approval lookup icon or enter the approval letter directly. If an entry is not ready to finalize, work can be saved as “P” for planning. Click “Save” to save entries.
To mass approve employees in the grid, click the lookup icon or enter the merit approval code in the Mass Merit Approval field. This field automatically populates the Merit Approval column for all employees in the SAU. Click “Approve” to update all staff and “Save” to save entries.

The Mass Approval feature automatically populates the Merit Approval column for all employees in the grid; not just those on the current view.

Note: Existing merit approval codes of “N” will not change; these codes must be updated individually.
### FSM Research Merit Approval

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>Planning Entry has taken place or is in process</td>
</tr>
<tr>
<td>N</td>
<td>No Entry No merit increase if employee is not active by 9/1</td>
</tr>
<tr>
<td>E</td>
<td>Evaluation Only (Staff only) Merit not granted to entire SAU based on economic environment; performance evaluation is entered</td>
</tr>
<tr>
<td>Z</td>
<td>Zero (Staff only) Merit not granted based upon performance</td>
</tr>
<tr>
<td>D</td>
<td>Dept Approval Department level approval</td>
</tr>
<tr>
<td>S</td>
<td>School Approval School level approval</td>
</tr>
<tr>
<td>R</td>
<td>Rejected Merit has been rejected and must be re-evaluated</td>
</tr>
<tr>
<td>A</td>
<td>Administration Final Approval from Administration</td>
</tr>
</tbody>
</table>

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Once planning data entry is complete, submit the “D” department level approval or “S” school level approval. Click “Approve” to update all employees and “Save”.
Once planning data entry is complete, submit the “D” department level approval or “S” school level approval. Click “Approve” to update all employees and “Save”.

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**myHR Examples**

2. Non-FSM Faculty

Merit by SAU – Faculty
Reappointment – Faculty
Promotion - Faculty
Enter a **Salary Admin Unit (SAU)** and click “Search”. MERIT By SAU pages can also be viewed by clicking “Advanced Search” to refine results.

*Note: Results displayed are limited by myHR security access.*
Select an SAU with the corresponding **Department Name** and **Salary Administration Plan (Salary Plan)**. *Note: Multiple Departments can be listed under the same SAU.*

Six tabs control the data displayed. Salary planning for non-FSM users allows information beyond merit to be submitted. *Note: Tabbing (vs. clicking) between fields allows values to calculate properly.*
Review the **Position Tab**. If necessary, enter the **New Position End Date** for each employee. Click “Save”.

Review the **Adjustment Tab**; new for non-FSM users. To be used in cases where salary must first be adjusted (usually due to a change in % full-time) before applying a merit increase.

*Note: Salary must be adjusted before merit increase can be applied.*
If necessary, enter a salary adjustment change value (positive or negative), intended adjusted rate, and intended percent full-time for the applicable employees.

Note: Salary must be adjusted before merit increase can be applied.

If an adjustment occurs, FTE Salary must be manually calculated. Adjusted FTE Salary = Adjusted Annual Rate / Adjusted Percent Full Time.

Note: Percent Full Time can be found on the “All Fields” tab.
Enter the **Adjustment Approval Code** for each entry. Click the Adjustment Approval lookup icon or enter the approval letter directly. If an entry is not ready to finalize, work can be saved as “P” for planning. Click “Save”.

Enter the **Adjustment Approval Code** for each entry. Click the Adjustment Approval lookup icon or enter the approval letter directly. If an entry is not ready to finalize, work can be saved as “P” for planning. Click “Save”.

48

49
To mass approve employees in the grid, click the lookup icon or enter the merit approval code in the Mass Merit Approval field. This field automatically populates the Merit Approval column for all employees in the SAU; not just those on current view. Click “Approve” to update and “Save”.

Faculty Merit Approval

| P | Planning       | Entry has taken place or is in process |
| N | No Entry       | No merit increase if employee is not active by 9/1 |
| E | Evaluation Only (Staff only) | Merit not granted to entire SAU based on economic environment; performance evaluation is entered |
| Z | Zero (Staff only) | Merit not granted based upon performance |
| D | Dept Approval  | Department level approval |
| S | School Approval| School level approval |
| R | Rejected       | Merit has been rejected and must be re-evaluated |
| A | Administration | Final Approval from Administration |
Enter the merit value for each faculty on the Merit Tab. Only one merit value (% Increase, $ Increase, New Compensation Rate, or New Annual Rate) needs to be entered; other fields will calculate automatically. Click “Save”.

Note: Tabbing (vs. clicking) between fields allows values to calculate properly.

New FTE Salary is required for employees in Salary Plans ACS, FAC, and LIB with merit increases. Calculate and enter the **New Full-Time Equivalent (FTE) Salary**. New FTE Salary = New Annual Rate / Percent Full Time. Click “Save”.

Note: Perfect full-time can be found on the “All Fields” tab.
Enter the merit approval code for each employee. Click the Merit Approval lookup icon or enter the letter directly. Click “Save”.

Enter the merit approval code for each employee. Click the Merit Approval lookup icon or enter the letter directly. Click “Save”.
The **Mass Approval** feature automatically populates the **Merit Approval** column for all employees in the grid; not just those on the current view.  
*Note: Existing merit approval codes of “N” will not change; these codes must be updated individually.*

Review the **Reappointment Tab**; view only for FSM users. If necessary, enter the New Appointment End Date for each employee.  
*Note: The position end date may also have to be extended; the position end date must be equal or greater than the appointment end date.*
Enter the Reappointment Approval Code. Click the Reappointment Approval lookup icon or enter the approval letter directly. Click “Save”.

Reappointment – Faculty page can also be used to submit Reappointments for all Faculty in an SAU.
Review the **Promotion Tab**; view only for FSM users. If necessary, enter the 6-digit **New Job Code** linked to the promotion for each applicable employee. Click “Save”.

*Note: Only promotions with change in compensation are updated on this page.*

**Promotion – Faculty page can also be used to submit promotions for all faculty in the SAU.**
Enter the promotion approval code. Click Promotion Approval lookup icon or enter the letter directly. Click “Save”.

View, enter, and approve all merit values or other changes on the All Fields tab. Note: Entries on any tab will not be submitted to administration until an approval code of “D” or “S” is saved.
When entries are saved the top calculations will update to reflect the most current entries from the grid below.

To assist planning, data can be downloaded at any time to Excel. Click “Save” to save myHR data before downloading. Click the spreadsheet icon.  
*Note: Ensure pop up blocker is off to download items.*
Select the downloaded item.  
*Note: Ensure pop up blocker is off to download items.*

Data downloaded to Excel appears as it does on merit increase pages. Click “Enable Editing” to manipulate data.
Note: Select “View All” or “View 100” to ensure all employees are visible. Also, data can be sorted by clicking the column header.

Review all tabs to update necessary appointment and merit increase data on the MERIT BY SAU – FACULTY page. Submit approval codes for all entries. Click “Save”.

Note: Select “View All” or “View 100” to ensure all employees are visible.
### Faculty Merit Approval

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>P</td>
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</table>

Once planning data entry is complete, submit the “D” department level approval or “S” school level approval. Click “Save”.
3. Staff with Discretionary Increase

Merit by SAU – Staff
Merit by Employee – Staff

Enter a Salary Admin Unit (SAU) and click “Search”. MERIT BY SAU pages can also be viewed by clicking “Advanced Search” to refine results.
Enter a Salary Admin Unit (SAU) and click “Search”. MERIT BY SAU pages can also be viewed by clicking “Advanced Search” to refine results.  
*Note: Results displayed are limited by myHR security access.*

Select an SAU with the corresponding Department Name and Salary Administration Plan (Salary Plan).  
*Note: Multiple Departments can be listed under the same SAU.*
Top calculations and a grid of all staff in that SAU will display. New for FY19, the Performance Evaluation column will automatically populate the Performance Excellence rating nightly from myHR Learn.

Note: The rating is required to submit merit increase values. Performance Evaluation column cannot be deleted or left blank; an error message will appear. If manual changes are entered, the nightly process will override data. Please update Performance Excellence ratings directly in myHR Learn.
Enter the **merit value** for each staff member in one of the four tabs. Only one merit value (% Increase, Dollar Amount, or New Annual Rate) is required; other fields will calculate automatically.

*Note*: Tabbing (vs. clicking) between fields allows values to calculate properly.

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**% Increase Tab:**
Enter merit value by percentage in the **Merit % Increase** column and “Tab” to update.
**% Increase Tab:**
Enter merit value by percentage in the Merit % Increase column and “Tab” to update. New annual rate will calculate automatically. Click “Save”.

**Dollar Amount Tab:**
Enter merit value by dollar amount in the Merit $ Increase column and “Tab” to update.
**Dollar Amount Tab:**
Enter merit value by dollar amount in the **Merit $ Increase** column and “Tab” to update. New compensation rate will calculate automatically. Click “Save”.

**New Annual Rate Tab:**
Enter merit value by dollar amount in the **Merit Annual Rate** column and “Tab” to update.
New Annual Rate Tab:
Enter merit value by dollar amount in the Merit Annual Rate column and “Tab” to update. New annual rate will calculate automatically. Click “Save”.

Note: New annual rate will automatically round to a number that can be paid biweekly or monthly.
All Fields Tab:
View and enter all merit values on the “All Fields” tab. If available in budget, discretionary increase values are available on this tab. Enter a new discretionary value in the appropriate Discretionary column.

All Fields Tab:
Note: Non-exempt staff can only receive discretionary dollar amount to be added to hourly rate.
All Fields Tab:
Note: Exempt staff can receive discretionary percentage to be added to merit increase total or discretionary lump sum, which is a one time payment.

All Fields Tab:
More data columns are available in the “All Fields” tab and can be helpful during the planning process.
If a discretionary increase is submitted, the MERIT BY EMPLOYEE - STAFF page must be updated with a reason for each applicable staff member.

The MERIT BY EMPLOYEE - STAFF page displays individual employee information. The Comment field must be completed to apply a discretionary increase.
Note: The MERIT BY EMPLOYEE – STAFF page allows users to see when the Performance Excellence rating was last updated. The Performance Excellence rating is uploaded automatically from myHR Learn; batches are uploaded nightly.

Return to the MERIT BY SAU - STAFF page. Enter the Salary Admin Unit (SAU) and click “Search”.
At any time, click the “Recalculate” button to update the top calculations. The “Total” fields will update to reflect the most current entries from the grid below. 

Note: The “Recalculate” button does not save entries.

To assist salary planning, data can be downloaded at any time to Excel. Click “Save” to save myHR data before downloading. Click the spreadsheet icon. 

Note: Ensure pop up blocker is off to download items.
Select the downloaded item.

Note: Ensure pop up blocker is off to download items.

Data downloaded to Excel appears as it does on merit increase pages. Click “Enable Editing” to manipulate data.
Note: Select “View All” to ensure all staff are visible. Also, data can be sorted by clicking the column header.

✓ Enter the merit value for each staff member in one of the four tabs on the MERIT BY SAU – STAFF page. Click “Save” to save all entries.
Enter the Merit Approval Code for each staff member. Click the Merit Approval lookup icon or enter the approval letter directly. If an entry is not ready to finalize, work can be saved as “P” for planning. Click “Save”.

Enter the Merit Approval Code for each staff member. Click the Merit Approval lookup icon or enter the approval letter directly. If an entry is not ready to finalize, work can be saved as “P” for planning. Click “Save”.
To mass approve staff in the grid, click the lookup icon or enter the merit approval code in the **Mass Merit Approval** field. This field automatically populates the Merit Approval column for all staff in the SAU. Click “Approve” to update and “Save”.

The **Mass Approval** feature automatically populates the **Merit Approval** column for all staff in the grid; not just those on the current view.

*Note: Existing merit approval codes of “E”, “N”, or “Z” will not change; these codes must be updated individually.*
Staff Merit Approval

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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</table>

Once salary planning data entry is complete, submit the “D” department level approval or “S” school level approval. Click “Approve” to update all staff members and “Save”.
FY19 Considerations

FY19 Faculty New Functionality

- All (NU & FSM) faculty planners have the ability to adjust salary
  - New Salary Adjustment feature in myHR
  - Salaries must be adjusted before merit increases are applied
    - Typically due to a change in % full-time

- Some pages are “view only” for FSM users
  - Position, Reappointment, Promotion
  - These planning tasks are completed by FSM Administration
FY19 Faculty Considerations

• Faculty Salary Adjustment Example:
  – Faculty Member Smith has an administrative appointment which carries 10% FTE
  – This administrative appointment is ending and their primary appointment FTE has to first be changed to 100%
  – The salary then needs to be adjusted accordingly
    • Must be adjusted before merit increase can be applied
    • Negative or positive adjustments or full intended rates can be entered

FY19 Staff Considerations

• New: Performance ratings uploaded automatically from myHR Learn
  – Uploaded nightly; will override any manually entered rating in the system
  – Performance Excellence and review discussions for staff will continue beyond merit deadlines
• Performance rating cannot be deleted and/or merit increase cannot be submitted without performance rating
  – Error message will appear
FY19 Staff Considerations

Determining Merit Increases:
1. Merit Pool
   – Merit Pool assigned to each Salary Administration Unit (SAU) by budgetary parameters

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

3. Current Pay Rate
   – Consider where the employee falls in the salary grade

FY19 Staff Considerations

• Discretionary increases
  – An additional discretionary amount may be available to recognize key contributors; dependent upon the budgetary parameters
  – A discretionary increase may be granted with or without a merit increase
  – Justification must be provided by using the MERIT BY EMPLOYEE – STAFF page
  – HR Compensation maintains final approval

• Exempt Staff: Paid as a lump sum or added to annual rate
• Non-Exempt Staff: Added into hourly rate
FY19 Deadlines

• **Feinberg deadlines**
  Open: 5/4
  Close: 6/13

• **Faculty deadlines**
  5/1 reappointment and promotion
  Open: 6/1*
  Close: 7/13

• **Staff deadlines**
  Open: 6/1*
  Close: 7/13

*Pending availability of budgets*
Next Steps

1. New users must submit General Security Access Form to: myhr-security@northwestern.edu
   - New users will receive a confirmation email once access is granted
2. Review annual performance excellence and salary planning materials online on the Compensation webpage
3. Log into myHR to enter merit and salary details

Open Lab Sessions

**Chicago Open Labs:**
Tarry Research, 300 E Superior St
Weinberg Lab 7-131
- Tues 5/15
- Tues 6/5
- Wed 6/13
- Tues 7/10

**Evanston Open Labs:**
Rebecca Crown Center, 633 Clark St
G593 Computer Lab
- Thurs 5/17
- Wed 6/6
- Thurs 6/14
- Wed 7/11
Additional Resources

- Calendar
- Tools and Guides
- Staff Excel Templates
- Salary Planning Queries
- Contacts List