SALARY PLANNER TRAINING

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Salary Planner Overview

- Salary Planner is the University's tool for reappointing budgeted Academic and Open Range employees, as well as budgeted Visiting Academic Professionals (VAP) and budgeted Non-Tenured Faculty Coalition (NTFC) members
- Salary Planner is different from the HR Front End (HRFE) as HRFE only allows someone to select one person at a time, while Salary Planner applies increases employees on a wider scale
- Salary Planner allows units to view and manipulate Budgeted Academic, budgeted VAP, budgeted NTFC, & Open Range employees person-by-person, or grouped together by Position ORG (including totals by ORG)
- You may change Salary, FTE, FOAPAL(s), and Title for Academic, VAP, & NTFC Employees. The only changes SHR allows for Open Range Employees is Salary & FOAPAL changes.

Which Jobs/Positions are Included in Salary Planner?

For Academic extract YY COA 1 AC:
- E-class 12/12 (BA/BB/AL/AM/PA/PB), 9/12 (AA/AB/BC/BD), and 10/12 (AG/AH/BG/BH) positions ONLY
- Job End Date must be BLANK or later than 8/15/20YY (end of current academic year)
- Position must be marked BUDGETED in NBAPBUD (Budget Profile R/B/N)
- Bargaining Units VP and CF are allowable

For Open Range extract YY COA 1 OR:
- Position must be e-group Civil Service (C/D)
- Position cannot be associated with a Bargaining Unit
- Job End Date must be BLANK or later than 8/21/20YY (this date varies from year to year slightly)
- Budget Profile does not matter

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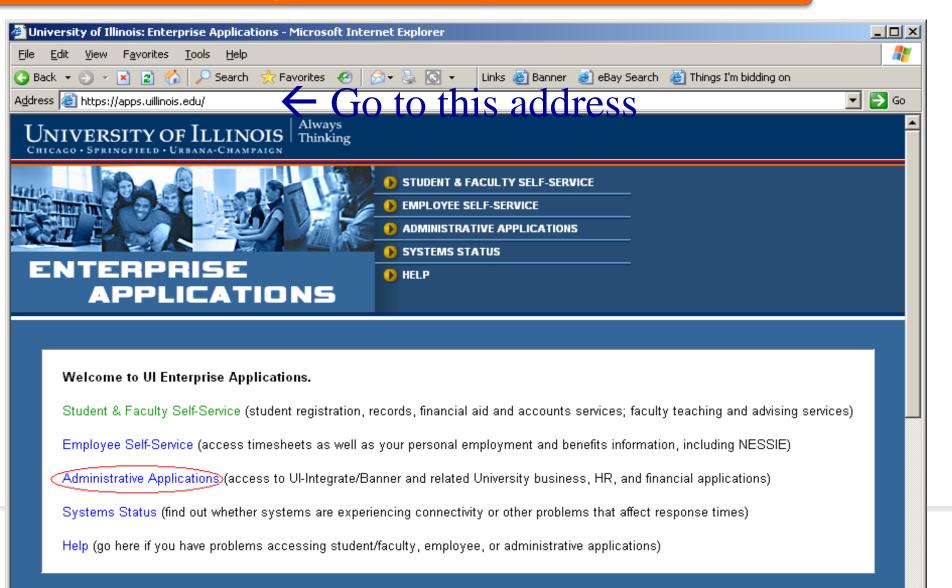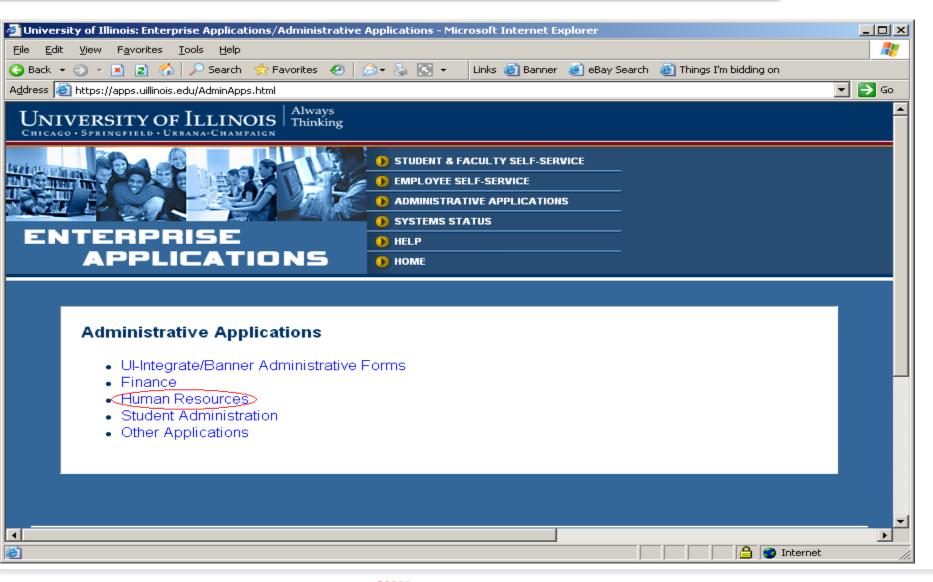Center for Training and Professional Development

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How do I Get Access to Salary Planner?

- For those employees at the unit level under a college, make sure your College HR Representative has approved you to use Salary Planner first
- Once approved, ask your unit's USC (Unit Security Contact) to request Salary Planner access for you through the AITS Security Request website:
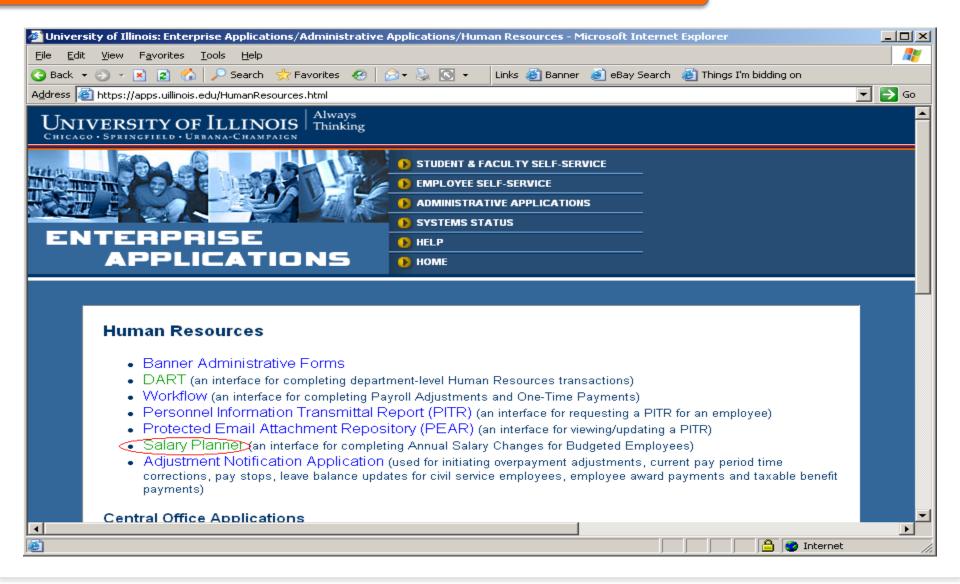
  https://webprod.admin.uillinois.edu/secapp/index.html

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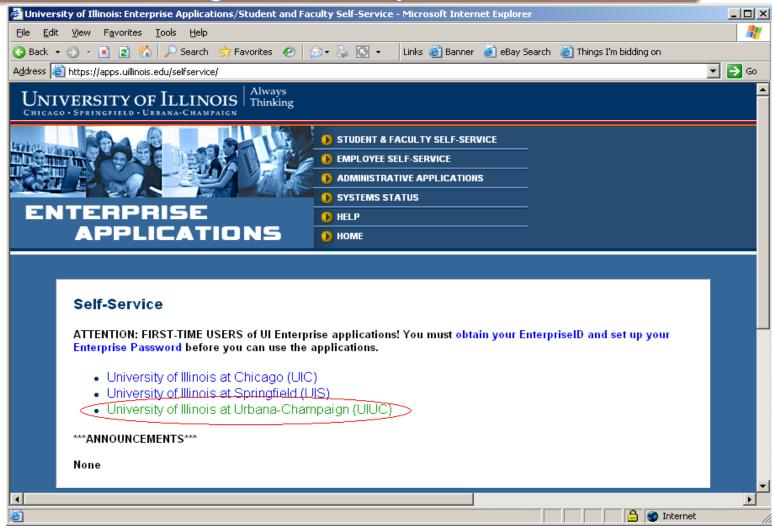Center for Training and Professional Development

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There is also a semi-direct link to Salary Planner as well:
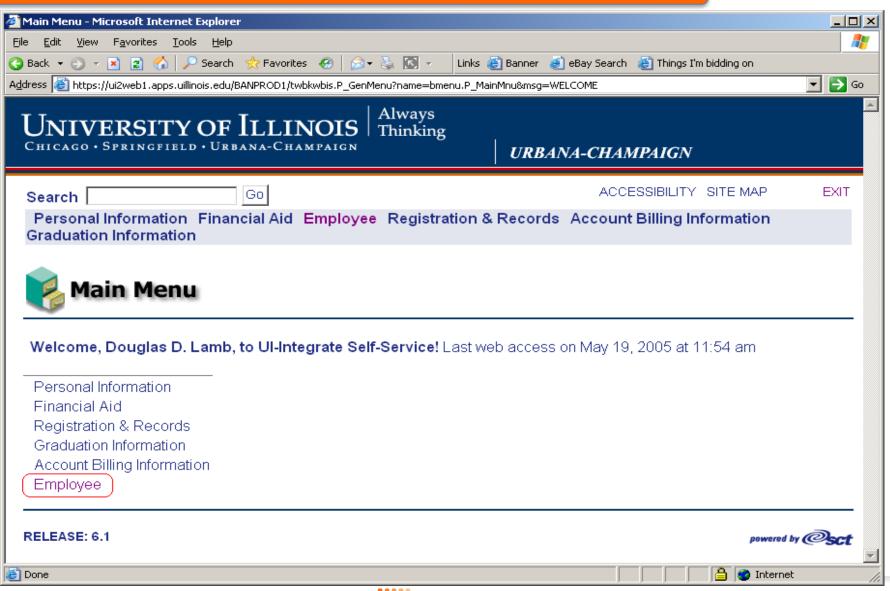**https://webprod.admin.uillinois.edu/ssa/servlet/SelfServiceLogin?appName=edu.uillinois.aits.SelfServiceLogin&dad=BANPROD1**

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How to get into Salary Planner 6
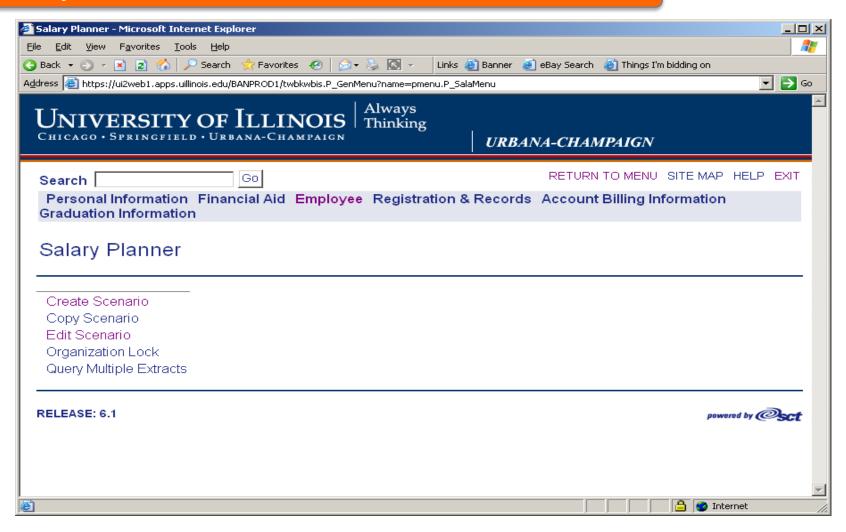
How to get into Salary Planner 7

Salary Planner Main Menu

Note: The "Create Scenario" option is not available for Colleges or Units. "Copy Scenario" is not an option used at the UIUC campus.

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Edit Scenario

- Most of your time spent with Salary Planner will be with the "Edit Scenario" function

- There are two "views" to your employees – by ORG or person-by-person. You may prefer one over the other, depending on the size of your unit

Salary Planner

Create Scenario
Copy Scenario
Edit Scenario
Organization Lock
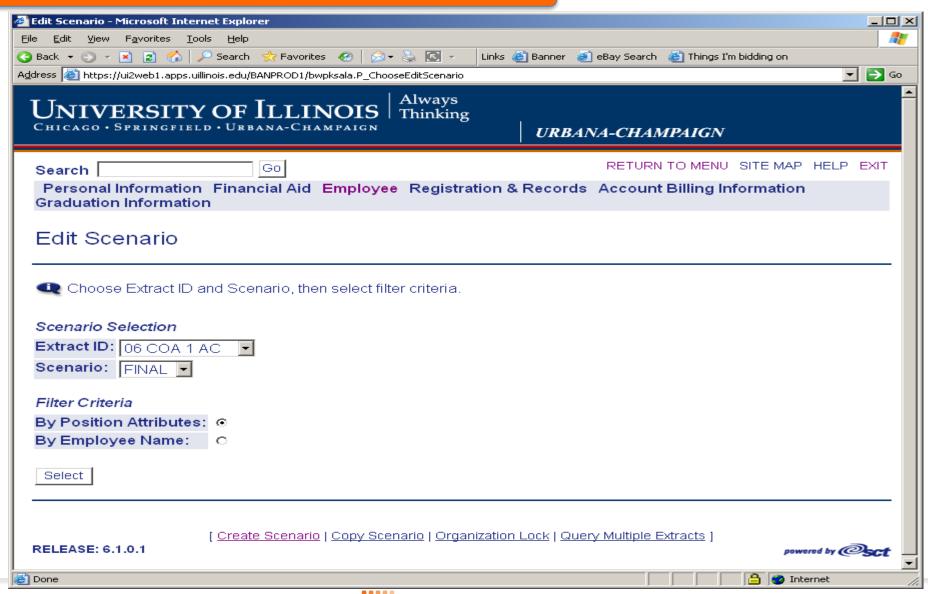Query Multiple Extracts

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"Edit Scenario" Screen

"Extract ID" Field

Scenario Selection

Extract ID: `06 COA 1 AC` ▼

- An "Extract" is a grouping of similar employees

- "Extract ID" identifies which Salary Planner extract you wish to view/work with

- The UIUC extracts are YY COA 1 AC, YY COA 1 OR, and YY COA 1 UA

- YY = Upcoming/New Fiscal Year of the Extract

- "1" = Chart of Accounts "1" (there are also COA "9" versions for Central Admin / "2" for UIC / "4" for UIS)

- "AC" = Academic; "OR" = Open Range; "UA" = Unpaid Academic (UA e-class jobs only)

- The last few FY extracts are also available for view (only), by selecting the previous fiscal year extract you wish to view. The oldest extract drops away after 5 years have passed

- The "Scenario" field will default to "Final" and there aren't any options – During the "practice" time period (usually May/June) the Scenario will be called "Preliminary" instead of "Final".

- "Filter Criteria" specifies which "view" of your employees you wish to use. "*By Position Attributes*" (next slide) allows you to select & view by ORG. "*By Employee Name*" (see slide 27) allows you to select and view by Name/UIN, although wildcards are permitted

Filter Criteria

By Position Attributes: ⦿
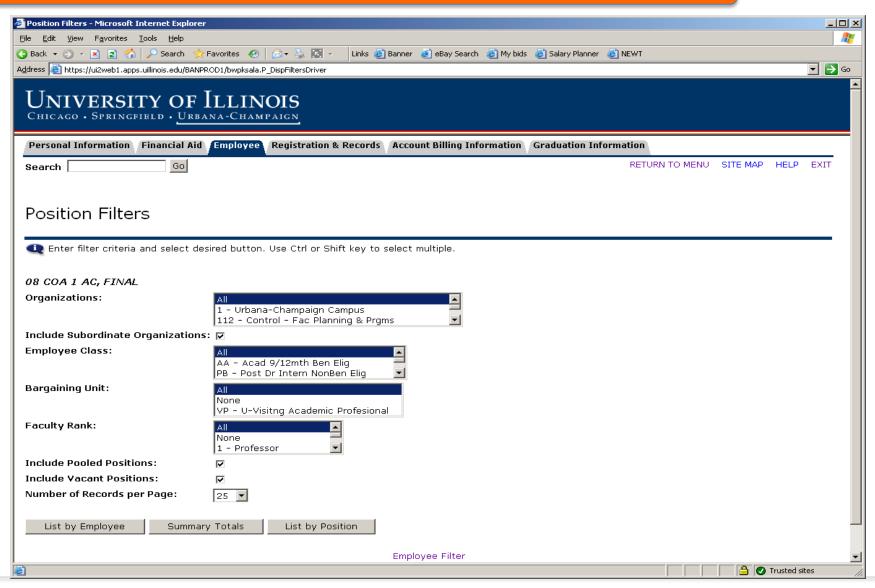By Employee Name: ○

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"By Position Attributes" Filter

"By Position Attributes" Description

- "Organizations" identifies which Org or Suborg you wish to view. The list is limited by your Salary Planner security. Multiple selections are allowable by CONTROL-clicking or SHIFT-clicking. You must select at least ONE Organization (or ALL) to continue

- *Optional* "Employee Class" allows you to filter employees by one ore more E-classes (AA 9/12 only, for example) – Default is ALL

- "Bargaining Unit" – Not applicable for Open Range. For Academic, the only options are VP for Visiting A/Ps and CF for NTFC (Specialized Faculty) members

- *Optional* "Faculty Rank" allows you to view tenure/tenure-track faculty members based on tenure designation (this information is based on PEAFACT information in BANNER) – Default is ALL – N/A for the OR extract

- *Optional* "Records per Page" allows more or less people to be displayed per screen – Default is 25 – may be changed as desired

- Press "**List by Employee**" button when finished

  NOTE: "Summary Totals" button will display totals by the ORGs(s) selected but does not contain individual job information – especially useful for college-level users in order to get a quick total of each ORG within the college

"List by Employee" Screen

220000 Materials Research Lab, Unlocked

ID and Name	Position, Suffix and Title	Employee Totals FTE	Salary	Department Totals Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary	Extract Status	Excluded from Totals
65████ P██████	U87██ - 00 PRIN RES SCI	1	112,080.20	.5	.5	56,040.16	.00	.00	56,040.16		No
65██████ S████████ ████████	U90██ - 00 RES ENGR	.5	40,520.04	.5	.5	40,520.04	.00	.00	40,520.04		No
Total:				1	1	96,560.20	.00	.00	96,560.20		

Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
220000 - Materials Research Lab	1	1	96,560.20	.00	.00	96,560.20
Total:	1	1	96,560.20	.00	.00	96,560.20

06 COA 1 AC - FINAL

Organization	Include Subordinate Organizations	Employee Classes	Bargaining Units	Faculty Rank	Include Pooled Positions	Include Vacant Positions
220000 - Materials Research Lab	Yes	All	All	All	Yes	Yes

Records 1 - 2 of 2

Save   Reset

Download Job Data   Download Job and Distribution

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"List by Employee" Basic Info - 1

- Employees are listed alpha-order, grouped by 6 digit POSN ORG code (as defined by NBAPBUD), with a total for each ORG listed

- Multiple jobs (in the same org ONLY) for an employee are combined together in one row (click employee's name to see all jobs listed separately – see slide 29)

- Any jobs a person has in a different org are NOT listed on this screen (to see a person's other jobs – see slide 29)

- Employees' overall salary & FTE (all jobs in Salary Planner) are listed for reference purposes

- FTE & Salary for the department is listed as "Base" and "Proposed" – normally you would not change "Base" information, but sometimes there is a need to – see slide 41 for more info

- You may assign a salary increase, either by percent or by dollar amount – Be careful when the person has multiple jobs in the same unit, as Salary Planner will split the increase across the jobs in a manner you may not like!

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"List by Employee" Basic Info - 2

- You may click on the person's name to take you to the "Employee Detail" screen, should you need to change the job's FTE, FOAPAL, to see all jobs listed separately, or to see job(s) the person has in other units (See slide 29)

- You may also click on the job's Position Number to take you to the "Job Detail" screen (See slide 32). Salary Planner will then show you what the job currently looks like in BANNER itself (NBAJOBS). Normally Salary Planner's BASE job information and NBAJOBS (labeled "Current") will match, unless you (or someone) submits an HR Checklist in order to change some aspect of the job (FTE, Salary, etc). When the "Base" Salary Planner information no longer matches what's "Current" in NBAJOBS, the "Extract Status" field will be display the word "Changed" (see slide 41 for more info on HRFE)

- **DO NOT HIT ENTER on this screen!!!!!!**

- Hitting ENTER will perform the "Mass Apply" function, which will discard any data you have entered on the individual jobs

- Use the TAB key on your keyboard to navigate from one field to the next, or directly click in the field you want to go to next

- During years without a "Salary Program" by default Salary Planner will assign no increase to all jobs – so no changes are required for most people and only people who are experiencing a promotion, title change, FTE change, or FOAPAL change will require a change in Salary Planner

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"List by Employee" Basic Info-4

- After entering one or more salary increases, use the "Page Down" key or scroll down to the SAVE button to save your changes – DO SO OFTEN to avoid data loss!

  Next 25 | Records 1 - 25 of 1024

  Save | Reset

- This is also the area where you can proceed from one screen to the next, using the "Next" and "Previous" buttons. Be sure you SAVE first, If you've changed anything on the current screen!
- When finished with this screen, use the "Return to Menu" option at the top of the screen to exit OR use the "Position Filter" link at the bottom of the screen to return to the ORG Selection screen

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One of the advanced features of the "List by Employee" screen is the ability to apply a percent increase or a dollar amount (prorated by FTE) to everyone who is listed on your screen:

Mass Change

| Rounding: | None ▼ |
| Hourly or Salary: | Both ▼ |

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase			Yes
Other			No
Across the Board			Yes

[Mass Apply]

NOTE: You would NEVER have a need to mass apply anything except for the "All-Merit Increase" category. Also, if you enter a % increase, all 0% jobs with pay also receive the same percent increase (which generally you will want to undo manually)

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Mass Change

Rounding:	1.00 ▼		
Hourly or Salary:	Both ▼		

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase	2.50		Yes
Other			No
Across the Board			Yes

Mass Apply

- The above example shows a 2.5% increase entered rounded to the nearest dollar
- Once you have entered your Percent or Dollar Amount, press the "Mass Apply" button
- Once the mass-apply occurs, you can always mass apply a different figure, or individually adjust any job to be a different increase %

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- At the bottom of the "List by Employee" screen, there are 2 download buttons for downloading raw data into Microsoft Excel or another 3rd party program
- You may also take the downloaded data to Engineering's "BPL Report" website: http://dfms.cen.uiuc.edu/cgi-bin/sp-report which will create a formatted BPL (Budgeted Position Listing) similar to what Budget Create used to provide (pre-BANNER

| Download Job Data | Download Job and Distribution |

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Employee Filter

Last Name: %

First Name:

ID:

Number of Records per Page: 25

Go

The second way of looking at Employees in Salary Planner is by use of the "By Employee Name" function from the "Edit Scenario" screen (see Slide 14)

This function is convenient if you have a specific person you wish to look at/manipulate

• Here you may enter a Name or UIN

TIP: If you wish to see a list of everyone you have authorization to, input % in the last name field

• Hit "GO" when you are finished entering Name/UIN info

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•If you used a wildcard search, and multiple results were found, the "Search Results" screen will appear showing everyone who matched your input conditions (alphabetically sorted)

 TIP: Right-Click on a person's name, then choose "Open in New Window" (or Tab) – this allows multiple people to be opened (see next slide) at the same time

•If your search returned just one name, this screen will not display and "Employee Detail" (see next slide) will display instead

Search Results

Select an employee to access the Employee Detail Page.

Name	ID
AMIR, EYAL	65
Abbas, Ali E.	65
Abbott, Annie R.	65
Abbott, Brenda	65
Abd El Khalick, Fouad	65
Abdel-Khalik, Ahmed R.	65
Abdullah-Span, Kaamilyah	65
Abelmann, Nancy A.	65
Abelson, John R.	65
Aber, Mark S.	65
Abrams, Daniel P.	65
Abuhouli, Awad H.	65

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"Employee Detail" Screen

Employee

Name and ID: ████████ 65█

Home Organization: 220000 - Materials Research Lab

Extracted Jobs

Position Suffix and Title	Organization	Base FTE	Proposed FTE	Base Salary	All-Merit Increase Percent	All-Merit Increase Amount	Other Percent	Other Amount	Proposed Salary	Links
U87██ - 00 PRIN RES SCI	220001 - Materials Rsrch Lab	.5	.5	56,040.04	.00	.00	.00	.00	56,040.04	
U87██ - 00 ADJ PROF	919000 - Materials Science & Engineerng	0	0	.00	.00	.00	.00	.00	.00	
U87██ - 00 PRIN RES SCI	220000 - Materials Research Lab	.5	.5	56,040.16	.00	.00	.00	.00	56,040.16	Job Detail Distribution Comments Position Detail
Total:		1	1	112,080.20	.00	.00	.00	.00	112,080.20	

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"Employee Detail" Basic Info - 1

- Each active job a person has appears on this screen (even jobs in other Orgs or non-budgeted but active jobs)

- Jobs in other Orgs are view-only to you if you do not have security to the other Org(s)

- You may assign a salary increase to a specific job by using the "All-Merit Increase" field – either as a percent or dollar amount

- Also, you may change "Proposed FTE" up or down. Be sure to make the corresponding changes to salary in the "FTE Change" column. For example, if a 50% job at $25,000 is being increased to 100%, change "Proposed FTE" to 1.0 and place $25,000 in "Other Amount". You may then apply the person's salary increase in the appropriate "All-Merit Increase" field

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"Employee Detail" Basic Info - 2

- When finished entering data, click the "SAVE" button at the bottom of the screen before attempting to leave the screen. DO NOT HIT ENTER!!!

- The "Mass Change" section at the top of this screen is relatively meaningless, since you are only looking at one person at this point – please ignore that section on this screen!

- There are links on this screen to take you to "Job Detail" (see next slide), Job Labor "Distribution" (see slide 34), and Job "Comments" (see slide 37)

- If you opened this screen in a separate window, you may just close this window when finished. Otherwise, just use your browser's BACK button to return to the previous screen

- There may be "Next" and "Previous" buttons at the bottom of the window (depending on where you came from) which allows you to navigate from one employee to another, as well

- Salary Planner now has various "buckets" in which to put changes, but UIUC is currently only using 2 of them (ALL-MERIT and FTE Change)

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"Job Detail" Screen

Job Detail for Position and Suffix U64███ - 00

Model:	Proposed	Base	Current
Effective Date:	Aug 16, 2005	Aug 16, 2004	Aug 16, 2004
Title:	ASST PROF	ASST PROF	ASST PROF
Hourly Rate: ✓	40.096925	40.096925	40.096925
Annual Salary: ✓	83,400.00	83,400.00	83,400.00
Total Change Percent:	.00		
Total Change Amount:	.00		
Appointment Percent: ✓	100.00	100.00	100.00
FTE: ✓	1	1	1
Hours per Day: ✓	8.00	8.00	8.00
Hours per Pay: ✓	173.33	173.33	173.33
Salary Group:	2006	2005	2005
Table: ✓	AA	AA	AA
Grade: ✓	UNDFD	UNDFD	UNDFD
Step: ✓	0	0	0
Budget Factor: ✓	87.50		
Estimated Fiscal Year Budget: ✓	83,400.00		
Exclude from Totals:	☐		

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"Job Detail" Basic Info

- This screen allows you to change the Job's title effective 8/16. Typically you would change a job's title for Faculty Promotions (ASST PROF to ASSOC PROF, etc) or A/P Promotions (such as RES SCI to SR RES SCI). If the person is leaving one job to take another, an HRFE transaction should be processed to end the current job and start the person in a new job). DO NOT CHANGE TITLES on OPEN RANGE jobs!!!
- Be sure to press SAVE (at the bottom of the screen) after changing the job's title, before leaving the screen
- In the event a job change occurs to someone effective up through 8/15 not reflected in Salary Planner, the change in salary and/or FTE should also be made in Salary Planner by changing BASE Salary and/or FTE on this screen (see slide 41) (AHR will make these adjustments for units automatically)
- This screen also shows what's current in BANNER's NBAJOBS form, in order to compare Salary Planner info with NBAJOBS info
- Use your browser's BACK button to return you to the previous screen

"Job Labor Distribution" Screen

Job Labor Distribution

ℹ️ Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

Distribution

Name and ID:	E████████ 65█████
Position-Suffix and Title:	U64███-00 ASST PROF
EPAF Transaction #:	

Current

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
1		100005	434000	211140	4████	PROF04					100.00	83,400.00
										Total	100.00	83,400.00

Proposed

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
1		100005	434000	211140	4████	PROF04					100.00	83,400.00
										Total	100.00	83,400.00

[Add a new record]

Proposed Position Distribution

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount
1		100005	434000	211140	4████	PROF04					100.00	83,400.00
										Total	100.00	83,400.00

Copy Position Distribution to Job	Copy Job Distribution to Position

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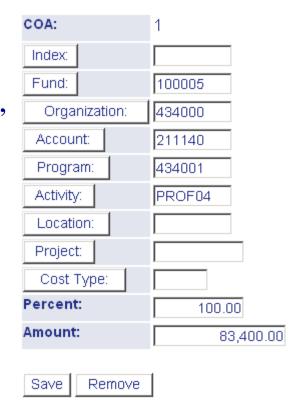
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"Job Labor Distribution" Info

- The "Current" section shows Job Labor Distribution currently active in BANNER's NBAJOBS screen, which may or may NOT match the proposed Job Labor distribution, because the proposed job labor distribution (applies to YY COA 1 AC only) in Salary Planner originates from the POSITION Labor Distribution screen in NBAPBUD (Does not apply to Open Range or Unpaid Academic extracts)

- If you wish to swap one FOAPAL for another (or remove a FOAPAL completely), click on the PERCENT field of the FOAPAL you wish to change and see the next slide

- If you wish to ADD an additional FOAPAL, click the "Add new record" link and see the next slide

- Once you change/add the Job FOAPAL(s), if you wish to copy the FOAPAL(s) up to the Position level, press the "**Copy Job Distribution to Position**" button

•From the previous slide, if you wish to add, change, or delete a FOAPAL, this screen allows entry of each of the FOAPAL segments, along with a "Percent" of funding (*note: the "Amount" field is view-only*).

•For an existing FOAPAL you wish to change, just override the applicable fields and press "**Save**"

•To delete a FOAPAL, simply hit "**Remove**"

•Remember that all job FOAPALS must total 100% when multiple FOAPALS are present

COA:	1
Index:	
Fund:	100005
Organization:	434000
Account:	211140
Program:	434001
Activity:	PROF04
Location:	
Project:	
Cost Type:	
Percent:	100.00
Amount:	83,400.00

Save   Remove

NEVER USE 0% on this screen!!!

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Job Comments

Name and ID:	E███████ 65████████
Position-Suffix and Title:	U64███-00 ASST PROF
Last Updated by:	Douglas D Lamb
Last Updated on:	May 17, 2005
Comments:	

Save | Reset

Job Comments are VERY important when making changes in Salary Planner beyond simple Salary Increases. If you have paperwork to accompany your change, please upload them in HRFE as "ADMIN" transactions and note that fact in Salary Planner's COMMENT area.

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Adding People/Jobs to Salary Planner

- Salary Planner does not have the capability to add people or jobs directly. Instead, we must use a process called the "*Add/Delete Process*" to add jobs and to take away jobs no longer active as of 8/16/YY

- For example, say you send AHR an HRFE transaction June 15th for a new A/P person "John" who is starting to work on June 25th. The initial extract already created wouldn't have John included. However, once the first Add/Delete occurs (around July 25st), assuming the job has been applied to BANNER by AHR (and the position is marked budgeted), Salary Planner would identify John as a budgeted academic and load his info into Salary Planner

- Likewise, anyone who is resigning his/her job(s) on or prior to 8/15/YY would come out of Salary Planner during the Add/Delete process once the HRFE transaction is processed & applied to NBAJOBS

- Also, if a job isn't budgeted in NBAPBUD's "Budget Profile" field, correcting the field will allow the job to come into Salary Planner at the next Add/Delete cycle (assuming its job end date is beyond 8/15/YY)

Academic Salary Planner Policies - 1

- Every Salary Planner job more than 0 FTE should (under normal circumstances) have a Rate Increase assigned in the "All-Merit" category. Normally, justification about ZERO dollar increases should be given to the Provost Office

- 0 FTE stipends/increments may or may not have a salary increase. If increased, it should be placed in the "*All-Merit*" field, NOT the "*Other Amount*" field

- Normally, salary increases of 0% or over 7% will need approval from the Provost Office – unless we have a year with no "Salary Program"

- If a current employee is given a new job & title, and the Proposed Salary crosses over the $90,000 threshold, a Biosketch will need to be prepared (by AHR Policy) and Board of Trustees approval will be needed for the new job. Until this job is approved at a future Board meeting, the title will need to begin with the modifier "*INTERIM*". NOTE: If the employee was previously Board approved at the time of hire, then this rule doesn't apply

- The only time the "*FTE Change*" column should be used is when FTE is being changed on the job

- In the rare event a job's salary is being reduced without a change in FTE, you may use "*Other Change*" for that purpose (TIP: an administrative increment reduction would be a likely situation)

- Employees holding the same job in 2 or more units normally have matching salary percent increases on all jobs which are really the "same job" (as designated by title), unless you have reason to give non-matching increases. Jobs with differing titles can have different salary increase percents without explanation

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- If you become aware of a change to someone's job effective 8/16, unless the change involves a new job being added or removed, you **SHOULD** make the change in Salary Planner WITHOUT involving the normal ERC transaction (one exception is e-class changes, such as 12/12 to 9/12). Any accompanying paperwork should be sent to AHR using the HRFE "ADMIN" transaction

- Changes effective prior to 8/16 (as well as any new jobs being added or ended) will require an HRFE transaction, since Salary Planner can only apply changes effective 8/16. In this case, the job's "*BASE*" Salary and/or FTE will be changed in Salary Planner by AHR

- Job changes effective AFTER 8/16 should not be routed to AHR until after Salary Planner "Upload" occurs in late-August

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- Example #1 – Salary Increase effective April 23rd from $50,000 to $53,000. In this case, the job's BASE Salary will be changed in "*Job Details*" by AHR. Any additional Rate Increase (effective 8/16) would be applied to the "*All-Merit*" column – The "*FTE Change*" column is NOT used here in this example!

- In this example, you would need Provost approval to give an 8/16 raise as a mid-raise since March 1st was just given to the person. Had the raise occurred prior to March 1st, then no Provost approval is needed

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- Example #2 – FTE change from 0.5 to 1.0 effective 5/1 along with a corresponding salary change from $35,000 to $70,000 (so no additional increase is given). In this case, the job's BASE FTE will be changed to 1.0 and the BASE Salary will be changed to $70,000. Any additional Rate Increase (effective 8/16) would be applied to the "*All-Merit Increase*" column – the "FTE Change" column is NOT used here!

- In this example, Provost approval is NOT needed here because a "raise" wasn't given on 5/1.

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