Salary Planner 2010 Training

Douglas Lamb
Academic Human Resources
July 14, 2010
Salary Planner Overview

- Salary Planner is the University’s tool for reappointing budgeted Academic and Open Range employees, as well as Visiting Academic Professionals (VAP).
- Salary Planner is different from the HR Front End as that system only allows someone to select one person at a time, while Salary Planner reappoints employees on a wider scale.
- Salary Planner allows units to view and manipulate Budgeted Academic, VAP, & Open Range employees person-by-person, or grouped together by ORG.
- You may change Salary, FTE, FOAPAL(s), and Title for Academic & VAP Employees. The only changes SHR allows for Open Range Employees is Salary changes.
Which Jobs/Positions are Included in Salary Planner?

For Academic extract 11 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 8/15/2010
• Position must be marked BUDGETED in NBAPBUD (Budget Profile R/B/N)
• Position cannot be associated with a Bargaining Unit

For Open Range extract 11 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 8/21/2010
• Position must be marked BUDGETED in NBAPBUD (Budget Profile R/B/N/RO/BO/NO)

For VAP extract 11 COA 1 VAP:
• Position E-group must be “B” (Academic Professional)
• Position must be coded with the “VP” Bargaining Unit code
• Job End Date must be BLANK or later than 8/15/2010
• Budget Profile does not matter
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
How to get into Salary Planner

Go to this address
How to get into Salary Planner 2

Administrative Applications

- UIIntegrate/Banner Administrative Forms
- Finance
- Human Resources
- Student Administration
- Other Applications
How to get into Salary Planner 3

- Banner Administrative Forms
- DART (an interface for completing department-level Human Resources transactions)
- Workflow (an interface for completing Payroll Adjustments and One-Time Payments)
- Personnel Information Transmittal Report (PITR) (an interface for requesting a PITR for an employee)
- Protected Email Attachment Repository (PEAR) (an interface for viewing/updating a PITR)
- Salary Planner (an interface for completing Annual Salary Changes for Budgeted Employees)
- Adjustment Notification Application (used for initiating overpayment adjustments, current pay period time corrections, pay stops, leave balance updates for civil service employees, employee award payments and taxable benefit payments)
How to get into Salary Planner 4

There is also a semi-direct URL link to Salary Planner as well:
https://webprod.admin.uillinois.edu/ssa/servlet/SelfServiceLogin?appName=edu.uillinois.aits.SelfServiceLogin&dad=BANPROD1
Enter your Enterprise (aka BANNER or HRFE) ID & password

Enter your EnterpriseID and password.

(Important: DO NOT include "@uillinois.edu", "@uiuc.edu",
"@uiuc.edu" or "@uis.edu" when entering your EnterpriseID)

EnterpriseID: 
Password: 

Login

Click here to reset your enterprise password.

ATTENTION: FIRST-TIME USERS of UI Enterprise applications! You must obtain your EnterpriseID and set up your Enterprise Password before you can use the applications.

Note: This is a one-time procedure; after setting up your Enterprise
How to get into Salary Planner 6

Welcome, Douglas D. Lamb, to UI-Integrate Self-Service! Last web access on May 19, 2005 at 11:54 am

Personal Information
Financial Aid
Registration & Records
Graduation Information
Account Billing Information

Employee

RELEASE: 6.1
How to get into Salary Planner 7

Employee Services

Salary Planner

RELEASE: 6.1
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.
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.
“Edit Scenario” Screen

Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID: 06 COA 1 AC
Scenario: FINAL

Filter Criteria

By Position Attributes: 
By Employee Name:

Select

RELEASE: 6.1.0.1
“Extract ID” Field

- An “Extract” is a grouping of similar employees
- “Extract ID” identifies which Salary Planner extract you wish to view/work with
- For 2010, the UIUC extracts are 11 COA 1 AC, 11 COA 1 OR, and 11 COA 1 VAP (Once created, the VAP extract will be read only this year as generally VAPs are not to receive a pay increase for 8/16)
- “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; “VAP” = Visiting A/P
- 2005-2009 extracts are still available for view (only), by selecting YY COA 1 AC or YY COA 1 OR where YY is the Fiscal Year you wish to query
Other Fields on “Edit Scenario”

• The “Scenario” field will default to “Final” and there aren’t any options – During the “practice” time period (usually in May) 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.
“By Position Attributes” Filter

Position Filters

Enter filter criteria and select desired buttons. Use Ctrl or Shift key to select multiple.

08 GOA 1 AG FINAL
Organizations:
- Urbana-Champaign Campus
- Control - Fac Planning & Prgrms

Include Subordinate Organizations: ✓
Employee Class:
- AA - Acad 9/12mth Ben Elig
- PB - Post Dr Intern NonBen Elig

Bargaining Unit:
- None
- V2 - U-Visiting Academic Professional

Faculty Rank:
- None
- 1 - Professor

Include Pooled Positions: ✓
Include Vacant Positions: ✓
Number of Records per Page: 25

List by Employee  Summary Totals  List by Position
“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 or more E-classes (9/12 only, for example) – Default is ALL.

• “Bargaining Unit” – for 11 COA 1 AC & 11 COA 1 OR there are no bargaining Unit options – for 11 COA 1 VAP all records are in the VP Bargaining Unit.

• 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 & VAP extracts.

• 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.
### 220000 Materials Research Lab, Unlocked

<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>FTE Salary</th>
<th>Base FTE</th>
<th>Proposed FTE</th>
<th>Base Salary</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Salary</th>
<th>Extract Status</th>
<th>Excluded from Totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>65</td>
<td>PFRIN RES SCI</td>
<td>112,080.20</td>
<td>.5</td>
<td>.5</td>
<td>56,040.16</td>
<td>0.0</td>
<td>0.0</td>
<td>56,040.16</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>65</td>
<td>RES ENGR</td>
<td>40,520.04</td>
<td>.5</td>
<td>.5</td>
<td>40,520.04</td>
<td>0.0</td>
<td>0.0</td>
<td>40,520.04</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

**Total:**

|   | 1 | 1 | 96,560.20 | .00 | .00 | 96,560.20 |

### Totals

<table>
<thead>
<tr>
<th>Organization</th>
<th>Base FTE</th>
<th>Proposed FTE</th>
<th>Base Salary</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>220000 - Materials Research Lab</td>
<td>1</td>
<td>1</td>
<td>96,560.20</td>
<td>.00</td>
<td>.00</td>
<td>96,560.20</td>
</tr>
</tbody>
</table>

**Total:**

|   | 1 | 1 | 96,560.20 | .00 | .00 | 96,560.20 |

### 06 COA 1 AC - FINAL

<table>
<thead>
<tr>
<th>Organization</th>
<th>Include Subordinate Organizations</th>
<th>Employee Classes</th>
<th>Bargaining Units</th>
<th>Faculty Rank</th>
<th>Include Pooled Positions</th>
<th>Include Vacant Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>220000 - Materials Research Lab</td>
<td>Yes</td>
<td>All</td>
<td>All</td>
<td>All</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Records 1 - 2 of 2

- Save
- Reset

- Download Job Data
- Download Job and Distribution
“List by Employee” Basic Info-1

- Employees are listed alpha-order, grouped by 6 digit 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!
“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 displayed the word “Changed” (see slide 41 for more info on HRFE).
“List by Employee” Basic Info-3

• **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 next
  • Special note on Visiting A/P’s – Salary Planner will display jobs which continue beyond 8/15, or have already been renewed for 8/16 using HRFE, or are brand NEW as of 8/16/10. Normally, VAPs require a salary increase on 8/16 of every year, but for 2010 there is no salary program so any increase must be approved by the Provost Office
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 data loss!

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.
“List by Employee” Mass Apply

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:

NOTE: You would NEVER have a need to mass apply anything except for the “All-Merit Increase” category
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 %.
“List by Employee” – Downloading Data

• 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 2004)
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
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.

<table>
<thead>
<tr>
<th>Name</th>
<th>ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMIR, Eyal</td>
<td>65</td>
</tr>
<tr>
<td>Abbas, Ali E.</td>
<td>65</td>
</tr>
<tr>
<td>Abbott, Annie R.</td>
<td>65</td>
</tr>
<tr>
<td>Abbott, Brenda</td>
<td>65</td>
</tr>
<tr>
<td>Abd El Khalick, Fouad</td>
<td>65</td>
</tr>
<tr>
<td>Abdel-Khalik, Ahmed R.</td>
<td>65</td>
</tr>
<tr>
<td>Abdiullah-Span, Kaamlyah</td>
<td>65</td>
</tr>
<tr>
<td>Abelmann, Nancy A</td>
<td>65</td>
</tr>
<tr>
<td>Abelson, John R.</td>
<td>65</td>
</tr>
<tr>
<td>Aber, Mark S.</td>
<td>65</td>
</tr>
<tr>
<td>Abrams, Daniel P.</td>
<td>65</td>
</tr>
<tr>
<td>Abouhouli, Awad H.</td>
<td>65</td>
</tr>
</tbody>
</table>
## “Employee Detail” Screen

**Employee**

**Name and ID:** [Redacted]

**Home Organization:** Materials Research Lab

### Extracted Jobs

<table>
<thead>
<tr>
<th>Position</th>
<th>Organization</th>
<th>Base PCE</th>
<th>Proposed PCE</th>
<th>Base Salary</th>
<th>All-Merit Increase Percent</th>
<th>All-Merit Increase Amount</th>
<th>Other Percent</th>
<th>Other Amount</th>
<th>Proposed Salary</th>
<th>Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>U87 - 00 PRIN RES SCI</td>
<td>220001 - Materials Resrch Lab</td>
<td>.5</td>
<td>.5</td>
<td>56,040.04</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>56,040.04</td>
<td>Job Detail Distribution Comments Position Detail</td>
</tr>
<tr>
<td>U87 - 00 PROF</td>
<td>919000 - Materials Science &amp; Engineering</td>
<td>0</td>
<td>0</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>job_detail_distribution_comments_position_detail</td>
</tr>
<tr>
<td>U87 - 00 PHIN RES SCI</td>
<td>220000 - Materials Research Lab</td>
<td>.5</td>
<td>.5</td>
<td>56,040.16</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
<td>56,040.16</td>
<td></td>
</tr>
</tbody>
</table>

**Total:** 1 112,080.20 .00 .00 .00 .00 .00 112,080.20
“Employee Detail” Basic Info

- 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 “Other Amount” 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
“Employee Detail” Basic Info

• 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
## “Job Detail” Screen

<table>
<thead>
<tr>
<th>Model:</th>
<th>Proposed</th>
<th>Base</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective Date:</td>
<td>Aug 16, 2005</td>
<td>Aug 16, 2004</td>
<td>Aug 16, 2004</td>
</tr>
<tr>
<td>Title:</td>
<td>ASST PROF</td>
<td>ASST PROF</td>
<td>ASST PROF</td>
</tr>
<tr>
<td>Hourly Rate:</td>
<td>40.96925</td>
<td>40.96925</td>
<td>40.96925</td>
</tr>
<tr>
<td>Annual Salary:</td>
<td>83,400.00</td>
<td>83,400.00</td>
<td>83,400.00</td>
</tr>
<tr>
<td>Total Change Percent:</td>
<td>.00</td>
<td>.00</td>
<td>.00</td>
</tr>
<tr>
<td>Total Change Amount:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment Percent:</td>
<td>100.00</td>
<td>100.00</td>
<td>100.00</td>
</tr>
<tr>
<td>FTE:</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Hours per Day:</td>
<td>8.00</td>
<td>8.00</td>
<td>8.00</td>
</tr>
<tr>
<td>Hours per Pay:</td>
<td>173.33</td>
<td>173.33</td>
<td>173.33</td>
</tr>
<tr>
<td>Table:</td>
<td>AA</td>
<td>AA</td>
<td>AA</td>
</tr>
<tr>
<td>Grade:</td>
<td>UNDFD</td>
<td>UNDFD</td>
<td>UNDFD</td>
</tr>
<tr>
<td>Step:</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Budget Factor:</td>
<td>87.50</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Estimated Fiscal Year Budget:</td>
<td>83,400.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exclude from Totals:</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
“Job Detail” Basic Info

• This screen allows you to change the Job’s title effective 8/16/10. Typically you would change a job’s title for Faculty Promotions (ASST PROF to ASSOC PROF, etc), A/P Promotions (such as RES Programmer to SR RES Programmer), or when the position is being reclassified along with the job. 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 6/30/10 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
Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

**Distribution**

**Name and ID:** [Redacted]
**Position-Suffix and Title:** U64 [Redacted] ASS PROF
**EPAF Transaction #:** [Redacted]

### Current

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100005</td>
<td>434000</td>
<td>211140</td>
<td>[Redacted]</td>
<td>PROF04</td>
<td></td>
<td></td>
<td></td>
<td>100.00</td>
<td>83,400.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total</td>
<td>100.00 83,400.00</td>
</tr>
</tbody>
</table>

### Proposed

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100005</td>
<td>434000</td>
<td>211140</td>
<td>[Redacted]</td>
<td>PROF04</td>
<td></td>
<td></td>
<td></td>
<td>100.00</td>
<td>83,400.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total</td>
<td>100.00 83,400.00</td>
</tr>
</tbody>
</table>

### Proposed Position Distribution

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project Type</th>
<th>Cost Type</th>
<th>Percent</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100005</td>
<td>434000</td>
<td>211140</td>
<td>[Redacted]</td>
<td>PROF04</td>
<td></td>
<td></td>
<td></td>
<td>100.00</td>
<td>83,400.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Total</td>
<td>100.00 83,400.00</td>
</tr>
</tbody>
</table>

[Add a new record]
“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 11 COA 1 AC only) in Salary Planner originates from the POSITION Labor Distribution screen in NBAPBUD (Does not apply to Open Range & VAP’s 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.
Adding/Changing FOAPALs

• 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

NEVER USE 0% on this screen!!!
Job Comments are VERY important when making changes in Salary Planner beyond simple Salary Increases. If you have paperwork to accompany your change, please note that fact in the Comments screen, along with the date the paperwork was sent to AHR – be sure to mark the documentation “Budget Documentation - Attention Cheryl”
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 8/16/2010.

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 1st), assuming the job has been applied to NBAJOBS 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 8/15/2010 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 8/15/2010).
Academic Salary Planner Policies

• 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 (n/a for 2010)

• 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 over 10% will need approval from the Provost Office – for 2010, ANY increase beyond faculty “Promotion & Tenure” items will require Provost approval

• 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
Academic Salary Planner Policies-2

• The only time the “Other Amount” column should be used is when FTE is being changed on the job, or (in the rare event) when the job’s salary is being reduced without a change in FTE (TIP: an administrative increment reduction would be a likely situation)

• Employees holding the same job in 2 or more units should have matching salary percent increases on all jobs which are really the “same job” (as designated by title). You may be asked for justification or asked to change your job’s FTE if a difference in salary increase is given by 2 or more units. Jobs with differing titles can have different salary increase percents without explanation
How to handle HR Transactions for Budgeted Academics

• 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 may make the change in Salary Planner WITHOUT involving an HRE transaction (one exception is e-class changes, such as 12/12 to 9/12). Any accompanying paperwork should be sent to AHR marked “Budget Materials – Attention Cheryl”

• 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. If the change is prior to 7/1, the job’s “BASE” Salary and/or FTE will be changed in Salary Planner by AHR. If the change is effective 7/1 to 8/15, the job’s “BASE” Salary and FTE will be left alone, but “All-Merit” and/or “Other Amount” (FTE changes only) will be populated to compensate for the change in job information. See next 2 slides for examples…

• Job changes effective AFTER 8/16 should not be applied by AHR until after Salary Planner Upload occurs in late-August
How to handle HR Transactions for Budgeted Academics-2

• Example #1 – Salary Increase effective 6/16 from $50,000 to $52,000. 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 “Other Amount” column is NOT used here in this example!

• Example #2 – Salary Increase effective effective 7/10 from $75,000 to $78,000. In this case, BASE Salary would be left at $75,000, but $3,000 would be placed in “All-Merit Increase” in order to get “Proposed Salary” to be $78,000. Any additional Rate Increase (effective 8/16) would go into the “All-Merit” column as well
How to handle HR Transactions for Budgeted Academics-3

- Example #3 – FTE change from 0.5 to 1.0 effective 6/16 along with a salary change from $35,000 to $70,000. 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 “Other Amount” column is NOT used here!

- Example #4 – FTE changes from 0.5 to 1.0 effective 7/10 ($25,000 to $50,000). In this case, Base FTE would be left at 0.5 but Proposed FTE would be increased to 1.0. Base Salary would be left at $25,000, but $25,000 would be placed in “Other Amount” in order to get “Proposed Salary” to be $50,000. Any additional Rate Increase (effective 8/16) would go into the “All-Merit” column
Contact Information:

Academic HR Salary Planner:
Doug Lamb - dougl@illinois.edu
Cheryl Hahn - cyhahn@illinois.edu

Open Range HR Salary Planner:
Tonya Wagner - tjwagner@illinois.edu

AHR Policy Questions:
Debi Stone - debstone@illinois.edu