

Procedures for the
**“Request for
Equity and Special
Salary Increase”
Form**

Supplement to the
Salary Increase Exercise SALX Guidelines

FY 2019-2020

Updated March 1, 2019



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Overview:

When and why to request an equity or special salary increase for an employee?

An equity or special salary increase request should occur under an exceptional circumstance that cannot be handled through the normal merit increase process. Refer to pages 5-6 of the Guidelines for details.

First, identify who in your area of responsibility may be a candidate for an equity or special increase. Second, work closely with your SALX Coordinator to complete the electronic form in the CSU SALX System. Remember, they are the only ones that can access the system. SALX Coordinators can pre-populate the demographic information in the electronic form (name, EID, department number, etc.), print it off and have the initiator finish providing the required information (funding source, merit amount – at least the university merit average amount, equity/special amount, justification and program/service impacts of this reallocation). The completed form is then returned to the SALX Coordinator for them to enter the information into the system and route for review and approvals.

Excel Template for Numerous Requests

If you anticipate numerous requests within a department, you may want to prepare an excel spreadsheet template that includes all the non-demographic information besides employee name (visit <http://www.budgets.colostate.edu/Depts/Processes.aspx?heading=4> to find the “Equity and Special Increase Form – Template”). The completed template would then be returned to the SALX Coordinator to enter the information in the system and route for review and approvals. Some internal practices may need to be established to determine the most efficient way to handle within each college or vice president’s area.

In order for this process to be successful, you must provide specific and succinct justifications and complete all required fields on the form. **Incomplete information will result in requests being rejected.**

If approved, the data will automatically feed into the SALX Eligibility and Increase Exercise form CSUHF029 shown below; which saves the SALX Coordinators from having to type in all the salary increase components and comments into the below form.

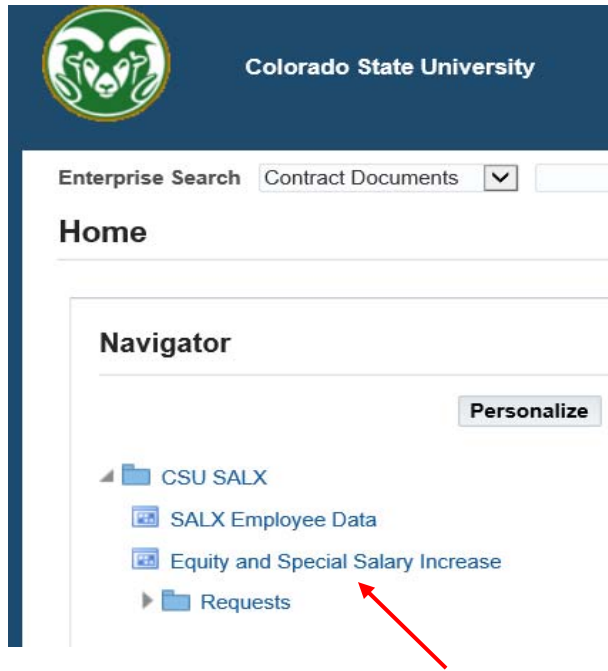
The screenshot shows a web-based form titled "SALX Employee Data" with a sub-header "Salary Eligibility and Increase Exercise" and a user ID "CHEY11". The form contains several input fields and checkboxes:

- Pid:** [Yellow input field]
- Exclude:** [Checked checkbox]
- Salary Authority Dept:** [Yellow input field]
- Admin Unit:** [Grey input field]
- Comments:** [Large text area]
- Department Name:** [Grey input field]
- Base Salary:** [Yellow input field]
- Employee Name:** [Yellow input field]
- New Salary:** [Yellow input field]
- Gender:** [Yellow input field]
- Ethnicity:** [Yellow input field]
- Zero Increase in Salary?:** [Unchecked checkbox]
- Salary Change:** [Yellow input field]
- Job Class:** [Yellow input field]
- Jobtitle:** [Grey input field]
- Merit Amt:** [White input field]
- Original BOS:** [Yellow input field]
- Basis Of Service:** [Yellow input field]
- Discipline/Individual Equity:** [White input field]
- Appt Type:** [Yellow input field]
- NTT Type:** [White input field]
- Promotion Amount:** [White input field]
- Employee Type:** [Yellow input field]
- Special Increase:** [White input field]

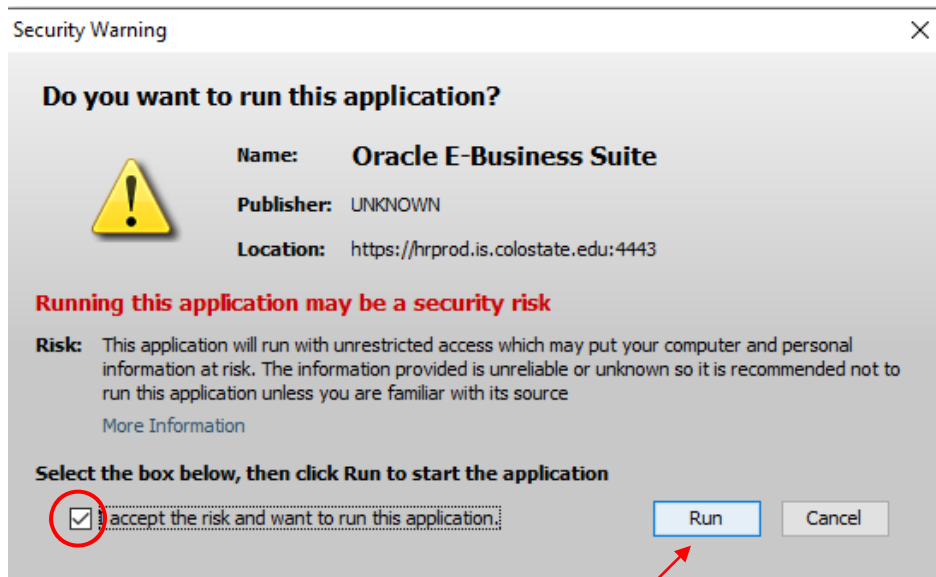
At the bottom, there is a key: F11 = Enter Query, Ctrl + F11 = Execute Query, F4 = Exit/Cancel.

Section A: Accessing and Creating the Equity/Special Increase Form

1. Go to the AAR website at <https://aar.is.colostate.edu/>
2. Click on the “HR System” link under “Application Systems”
3. Expand the CSU SALX section by clicking on the arrow or the folder / link name
4. Click on the **Equity and Special Salary Increase** link.



5. When the security warning screen pops up, click the “I accept the risk and want to run this application.” box and click run.



When you access the form, it should look like the image below.

Equity and Special Increase

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM CSUHF040

FISCAL YEAR 2019 - 2020

Name Employee ID Primary Assignment Number

Department Number and Name Admin Unit

Salary Authority Department Salary Authority Dept Name

Effective Date People Group

Title Employment Category

Current Base Salary \$ Salary Basis NTT Type

Funding Sources and Percentages

Proposed Merit Increase \$ and % Notes

Equity Increase Request \$ and %

Special Increase Request \$ and %

Total Increase \$ and %

Proposed Salary \$

Justification

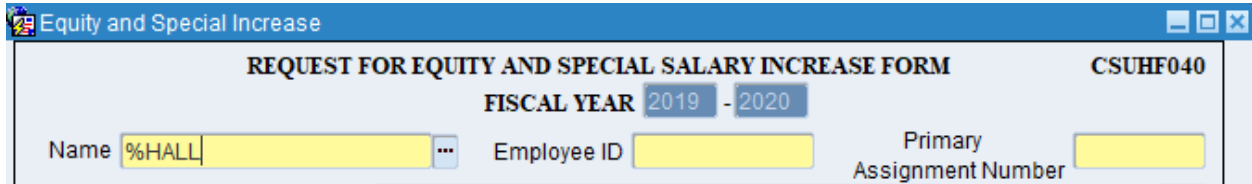
Program/Service Impacts of this Reallocation

Approved

Note: The User is in Create Mode (not Query Mode) when the form has fields highlighted in yellow. Create Mode allows you to enter a new record and Query Mode allows you to view/update an existing record.

Creating a New Record

When creating a new record, enter information into one of the following: Name, Employee ID, or Primary Assignment Number. The easiest way to search for an employee is to place the wildcard “%” at the beginning of the “Name” field followed by the last name (as shown below) and click ENTER.



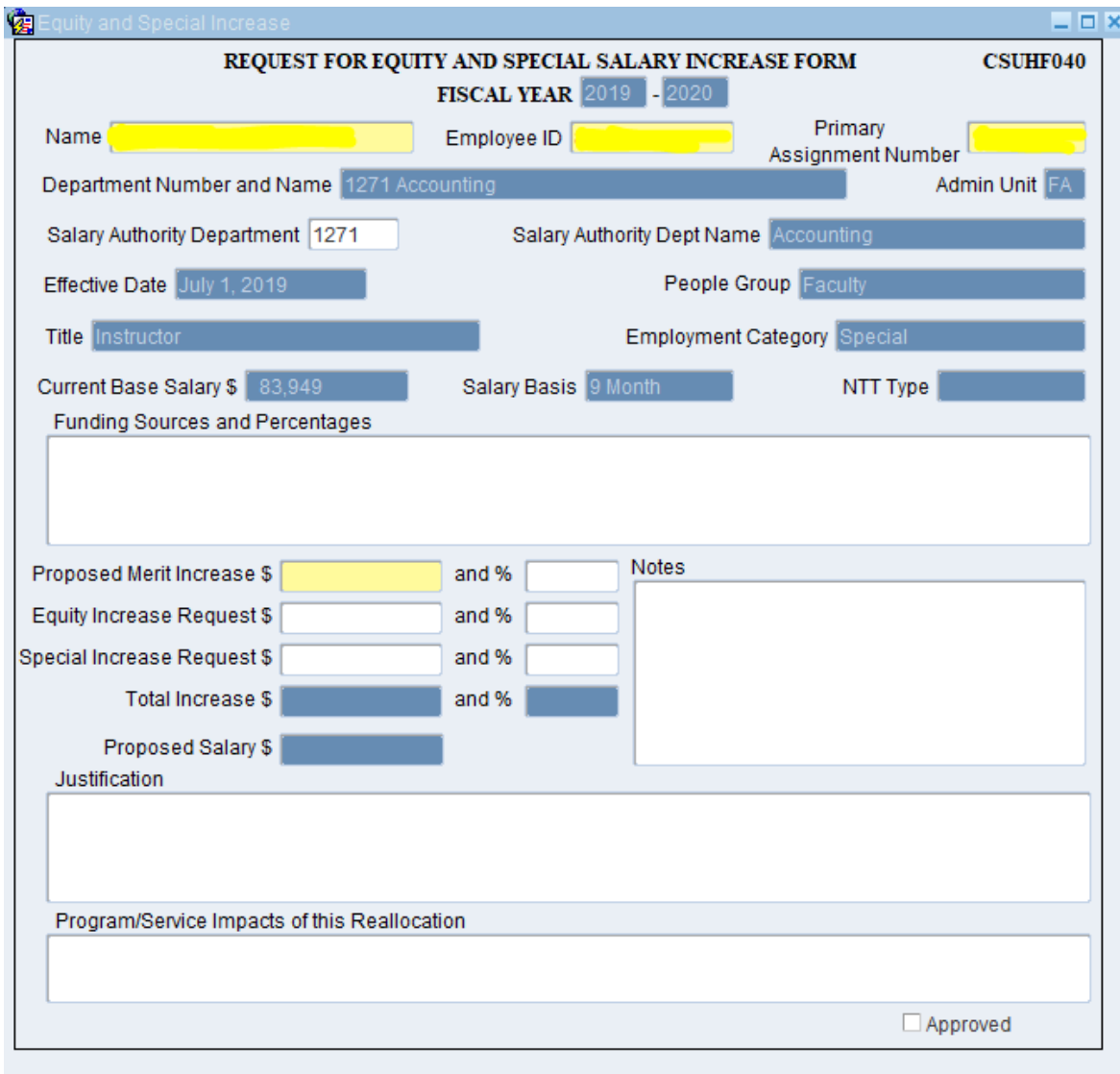
Equity and Special Increase

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM CSUH040

FISCAL YEAR 2019 - 2020

Name %HALL Employee ID Primary Assignment Number

After the name has been selected, the remaining fields will auto populate (see dark blue highlighted fields in form below).



Equity and Special Increase

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM CSUH040

FISCAL YEAR 2019 - 2020

Name Employee ID Primary Assignment Number

Department Number and Name 1271 Accounting Admin Unit FA

Salary Authority Department 1271 Salary Authority Dept Name Accounting

Effective Date July 1, 2019 People Group Faculty

Title Instructor Employment Category Special

Current Base Salary \$ 83,949 Salary Basis 9 Month NTT Type

Funding Sources and Percentages

Proposed Merit Increase \$ and %
Equity Increase Request \$ and %
Special Increase Request \$ and %
Total Increase \$ and %
Proposed Salary \$

Notes

Justification

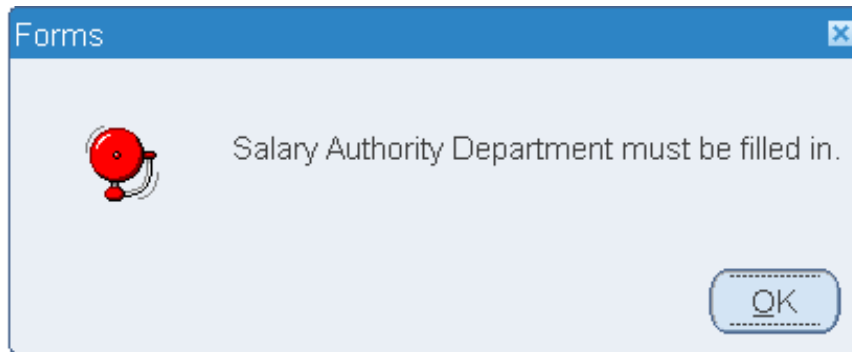
Program/Service Impacts of this Reallocation

Approved

Salary Authority Departments

Incorrect Salary Authority Department

If the Salary Authority Department is incorrect then make the update and save the form. **Make sure to also change it in the HR System (ORACLE) in order for this revision to be permanent.** To make the update go to: CSU Maintain Person>Special Info>Salary Authority Department. When changing the Salary Authority Department in HR make sure to end date the old information, add the new department # and then save. If the user tries to save the form with nothing populated in the Salary Authority Department field then the following error message will pop-up:



No Entry in Salary Authority Department

If nothing pre-populates in the Salary Authority Department field on the Equity/Special Salary Increase form, this means the Salary Authority Department in HR is blank. **Before the new record can be saved the user will have to add the new department # in the HR System (ORACLE).** To make this update, go to: CSU Maintain Person>Special Info>Salary Authority Department. Once the department # is saved in ORACLE then the user can come back to the Equity/Special Salary Increase form and the Salary Authority Department field should be pre-populated.

The "Proposed Merit Increase \$" field also must be populated in order for the new record to be saved (the system will not allow anything less than the University average merit % to be inserted). **NOTE: After the new record is saved, the user should exit out of the form completely (press F4) and come back into a new form if another record needs to be created.**

It is recommended that the SALX Coordinators print the form (see Section C for instructions) and give it to the Department Head, Director, etc. (individual responsible for determining the raise for their employee) who will then complete the remaining fields (Funding Sources and Percentages, Justification and Program/Service Impacts of this Reallocation) except the "Notes" field. Upon completion, return the form to the SALX Coordinator who will then enter the information into the electronic form.

Below is an example of a completed form (Name, Employee ID, and Primary Assignment Number were intentionally omitted):

Equity and Special Increase CSUHF040

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM

FISCAL YEAR 2018 - 2019

Name Employee ID Primary Assignment Number

Department Number and Name 1271 Accounting Admin Unit FA

Salary Authority Department 1271 Salary Authority Dept Name Accounting

Effective Date July 1, 2019 People Group Faculty

Title Associate Professor Employment Category Regular

Current Base Salary \$ 100,000 Salary Basis 9 Month NTT Type Continuing

Funding Sources and Percentages
EG = 100% from 13xxxx

Proposed Merit Increase \$	4,000	and %	4.0000	Notes Special Increase Request of \$1,000 (1%) should stay the same if the University Average Merit Increase % changes.
Equity Increase Request \$	<input type="text"/>	and %	<input type="text"/>	
Special Increase Request \$	1,000	and %	1.0000	
Total Increase \$	5,000	and %	5.0000	

Proposed Salary \$ 105,000

Justification
Outstanding service over the past 10 years in serving the needs of the department, particularly in the capacity as undergraduate coordinator. He is an award winning instructor at both the undergraduate and graduate level.

Program/Service Impacts of this Reallocation
Internal expenditure adjustments within the unit will be made to cover this salary investment.

Approved

SALX Coordinator’s Responsibilities

The SALX Coordinator has the responsibility to complete the following steps:

- Validate the salary authority department number is correct
- Validate funding sources and percentages of how the proposed equity or special increase will be paid is populated. **As stated in the Guidelines, there is no central funding provided.**
- Validate the merit, equity, and special increase amounts are correct.
- Provide additional information under the “Notes” section if needed (optional)
- Validate the justification rationale is specific and succinct (see table below)
- Validate the program/service impacts of this reallocation is populated and relevant

Helpful Reminders

1. Keep the notes and justification comments concise yet informative. There is a limited number of characters allowed in each text box on the form, which will restrict your remarks in order to encourage clear and succinct statements.
2. Do not insert general statements in multiple forms without giving specific details for each employee.

Acceptable Justifications

See the table below for acceptable justifications.

Justifications for Special Increase	Justifications for Equity Increase
<ul style="list-style-type: none"> • Insignificant changes in job duties and/or increase in responsibilities only. 	<ul style="list-style-type: none"> • Tenure-track/tenured faculty member increase supported by data from the Equity Study or provided by the Chair/Head of an equity issue when compared to peers within the department.
<ul style="list-style-type: none"> • Outstanding performance that cannot entirely be addressed through merit increase 	<ul style="list-style-type: none"> • Non-tenure track faculty member increase may be supported by data provided by the Chair/Head of an equity issue when compared to peers within the department.
<ul style="list-style-type: none"> • Additional or completed education, training or degree 	
<ul style="list-style-type: none"> • Retention - adjustment where retention is a major issue for faculty or administrative professional whose salary is not competitive with comparable positions outside of CSU. Requires supporting documentation. 	
<ul style="list-style-type: none"> • Salary compression – to correct issues where employees with more years of service are paid at a lower rate than peers that were hired later. 	<ul style="list-style-type: none"> • Salary compression – to correct issues where employees with more years of service are paid at a lower rate than peers that were hired later.
<p>Note: For major changes in job duties, increase in responsibilities, promotions beyond the official Promotion & Tenure process, requests will require review and approval by the Office of Equal Opportunity and Human Resources through the AAR process by April 12th to be considered in the SALX process with an effective date of July 1. If not, the request will have to be submitted for consideration through the off-cycle/AAR request process and become effective after July 1. Backdating of promotions and salary increases is not permitted.</p>	

Section B: Viewing/Updating Existing Records

Create Mode and Query Mode

In order to switch from *Create Mode* to *Query Mode*, press **F11**. The fields in *Query Mode* are white (unlike *Create Mode* where they are yellow). *Query Mode* allows the user to search for records that have already been saved. The screen will look as shown below:

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM CSUHF040

FISCAL YEAR 2019 - 2020

Name Employee ID Primary Assignment Number

Department Number and Name Admin Unit

Salary Authority Department Salary Authority Dept Name

Effective Date July 1, 2019 People Group

Title Employment Category

Current Base Salary \$ Salary Basis NTT Type

Funding Sources and Percentages

Proposed Merit Increase \$ and % Notes

Equity Increase Request \$ and %

Special Increase Request \$ and %

Total Increase \$ and %

Proposed Salary \$

Justification

Program/Service Impacts of this Reallocation

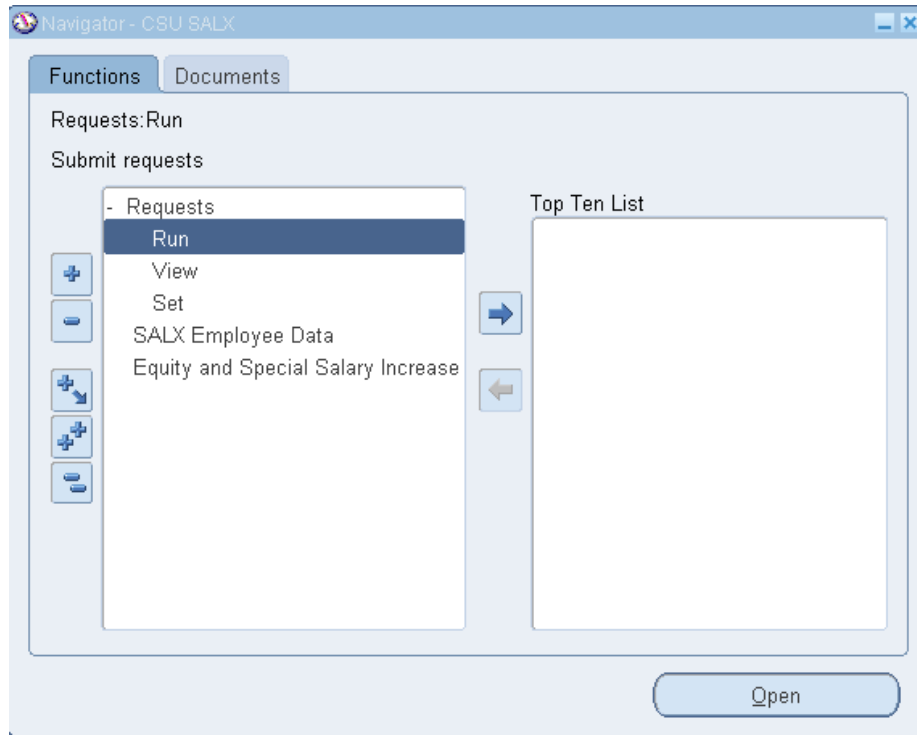
Approved

Searching for a Record

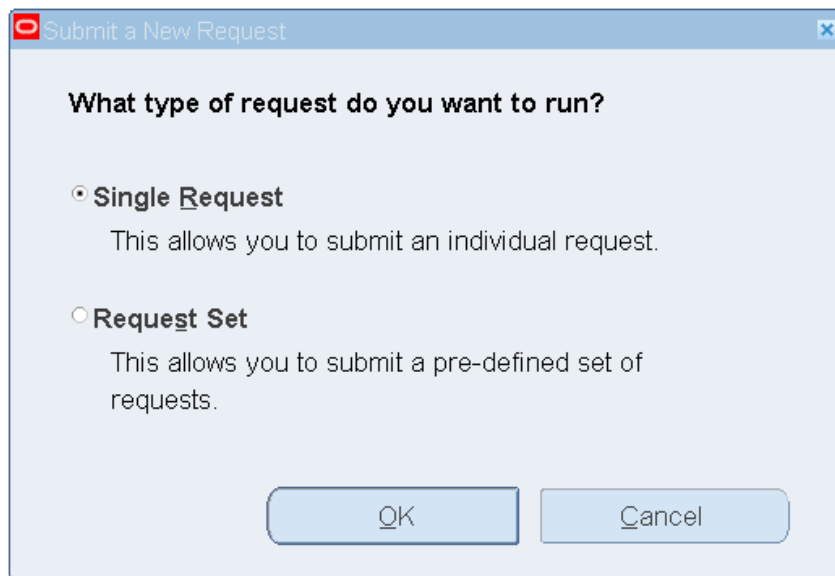
To search for a record, input Name, Employee ID or Primary Assignment Number and press **Ctrl+F11** to retrieve records already created. Once in the record, the user can update the form. Be sure to **SAVE** any changes. To view all the records you have access to, use “%” in the Name field and press **Ctrl+F11**. You then have the ability to scroll up and down through all your records.

Section C: Printing the Form to Route for Approvals

The next step is to print the form and route it for approvals. In order to print the form, you need to exit the “Equity and Special Salary Increase” window. This can be done by pressing F4 or clicking the “X” in the top right-hand corner of the form. Once in the SALX main menu, double click on “Requests” followed by double clicking on “Run.” See below illustration of the “Requests” menu.



Select Single Request and click “OK”.



To print the request, under the “Name” field, click on the ellipsis “...” and select Equity and Special Increase Form.

Submit Request

Run this Request...

Copy...

Name

Operating Unit

Parameters

Language

Language Settings... Debug Options

At these Times...

Run the Job As Soon as Possible Schedule...

Upon Completion...

Save all Output Files

Layout Options...

Notify Delivery Opts

Print to

Help (C) Submit Cancel

Reports

Find %

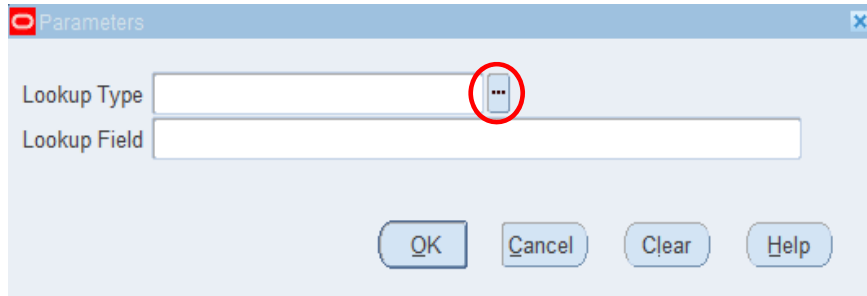
Name	Application
Employee Eligibility Report	CSUH Local I
Employee Salary Increase Report	CSUH Local I
Equity and Special Increase Form	CSUH Local I
Salary Exercise Comment Report	CSUH Local I
Salary Increase Entry Form Report	CSUH Local I
Salary Increase Summary Report	CSUH Local I

Find

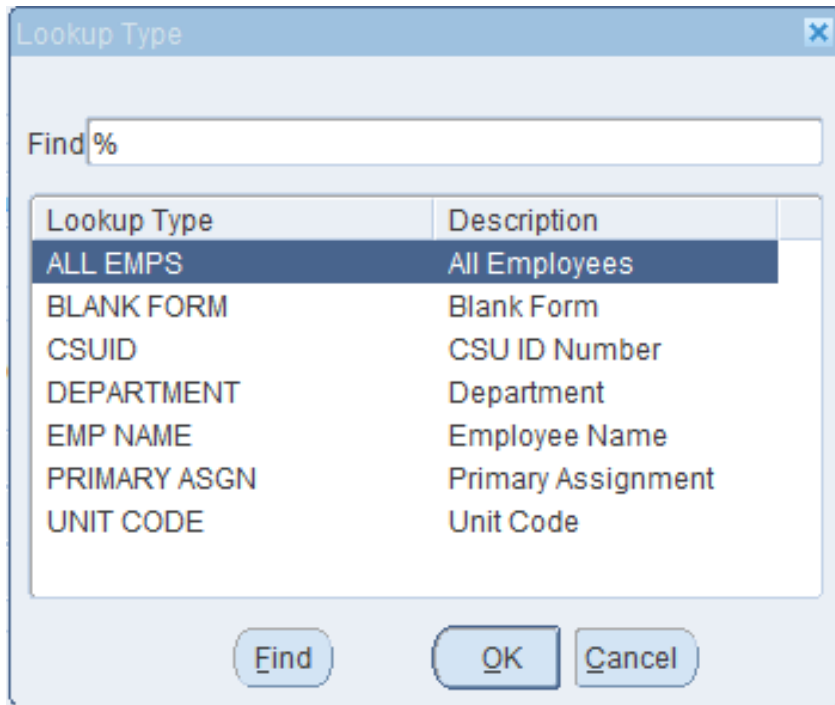
OK Cancel

After the user has selected to print the equity/special report, select a “lookup type” from the drop down box options and input the appropriate information in the “lookup field”. Both of these fields need to be completed in order to print Equity/Special Request forms. The only time when the “lookup field” box can be blank is when the user has selected ALL EMPS or BLANK FORM in the Lookup Type field.

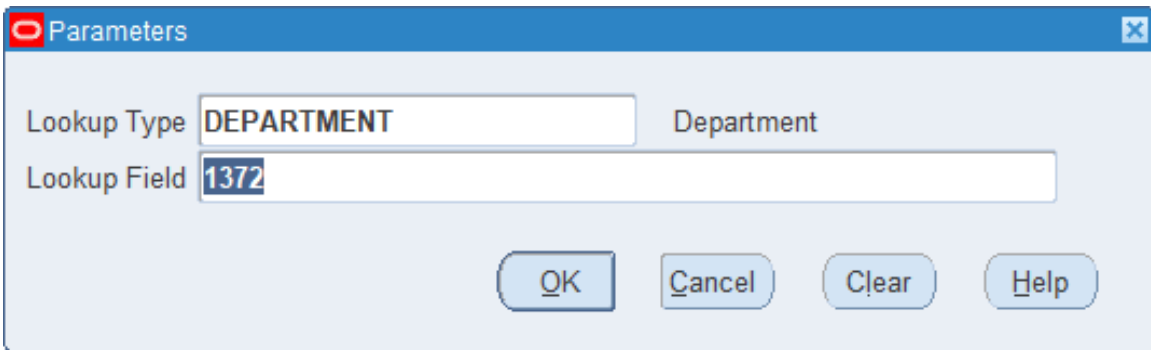
NOTE: The wildcard sign “%” should not be utilized when typing information in the Lookup Field (e.g., if the lookup type is employee name then do not put the first letter and then “%” as this will not yield any results). Instead, write out the employees’ name as it appears in the SALX employee data screen.



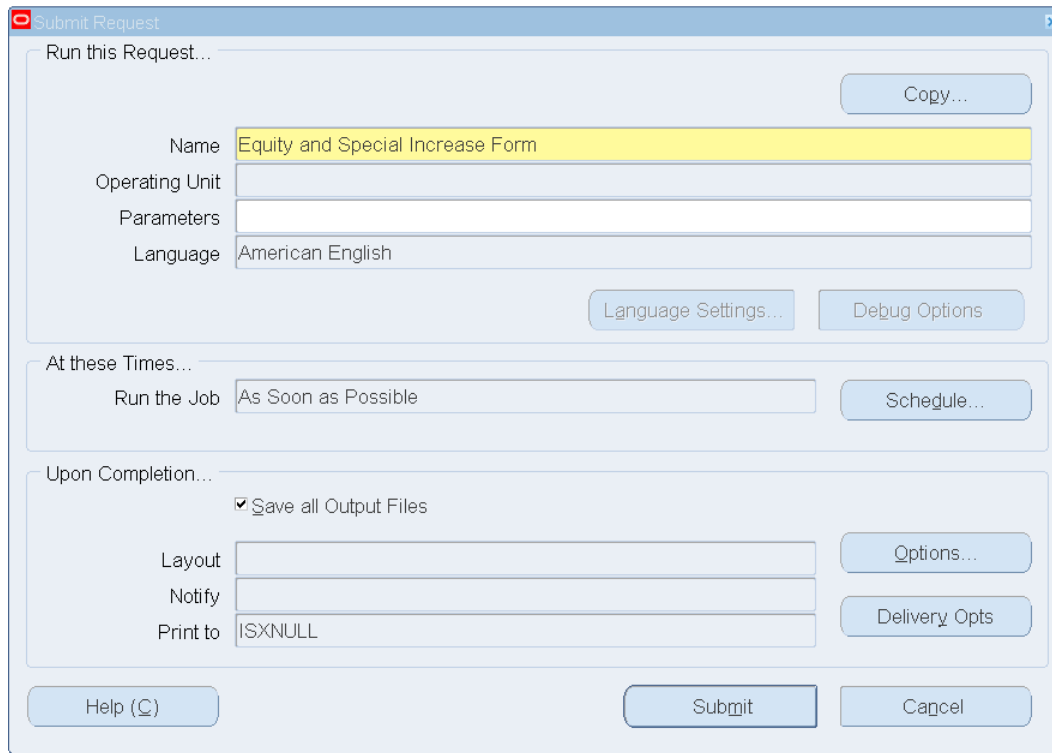
Click on the ellipsis “...” next to the “lookup type” box (in above screen) and you will get the below screen. Based on what “lookup type” you choose will be what you put in the “lookup field”.



For example, if DEPARTMENT is selected from the “lookup type” display, enter the department number to be printed in the “lookup field” box. Once the selection is made, click “OK”.



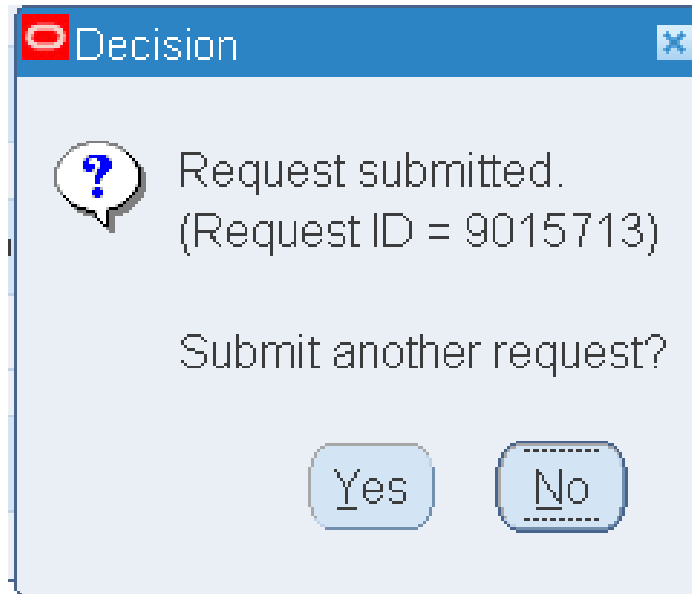
Then click “Submit”.



The 'Submit Request' dialog box is shown with the following fields and buttons:

- Run this Request...**
 - Name: Equity and Special Increase Form
 - Operating Unit: [Empty]
 - Parameters: [Empty]
 - Language: American English
 - Buttons: Copy..., Language Settings..., Debug Options
- At these Times...**
 - Run the Job: As Soon as Possible
 - Button: Schedule...
- Upon Completion...**
 - Save all Output Files
 - Layout: [Empty]
 - Notify: [Empty]
 - Print to: ISXNULL
 - Buttons: Options..., Delivery Opts
- Bottom Buttons: Help (H), Submit, Cancel

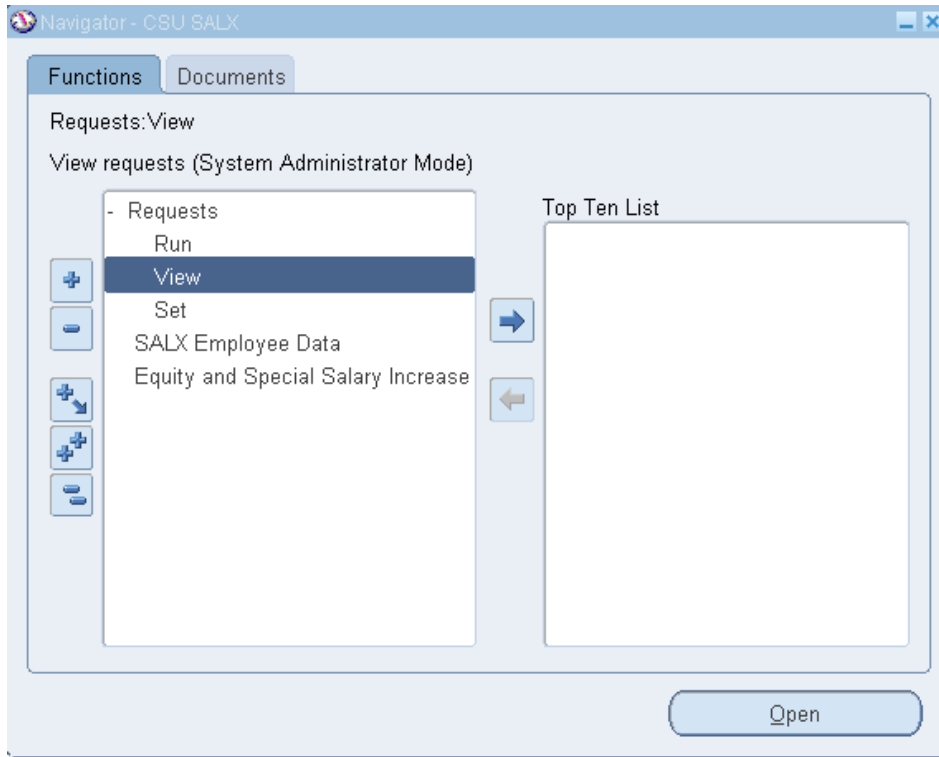
Select “No”.



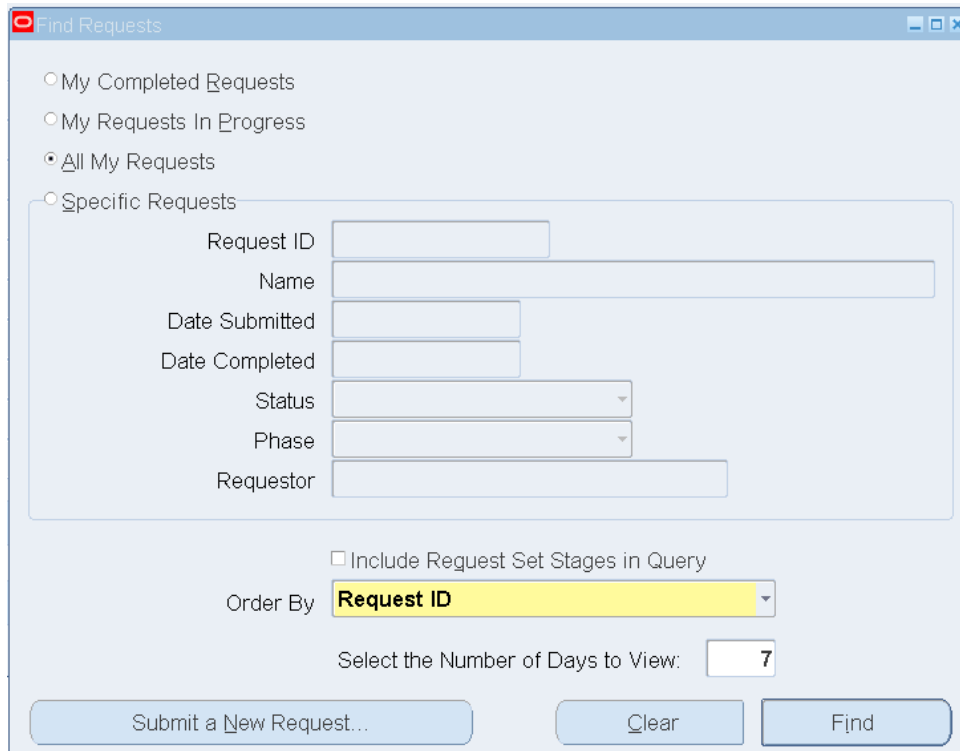
The 'Decision' dialog box displays the following information:

- Icon: Question mark in a speech bubble
- Text: Request submitted.
(Request ID = 9015713)
- Text: Submit another request?
- Buttons: Yes, No

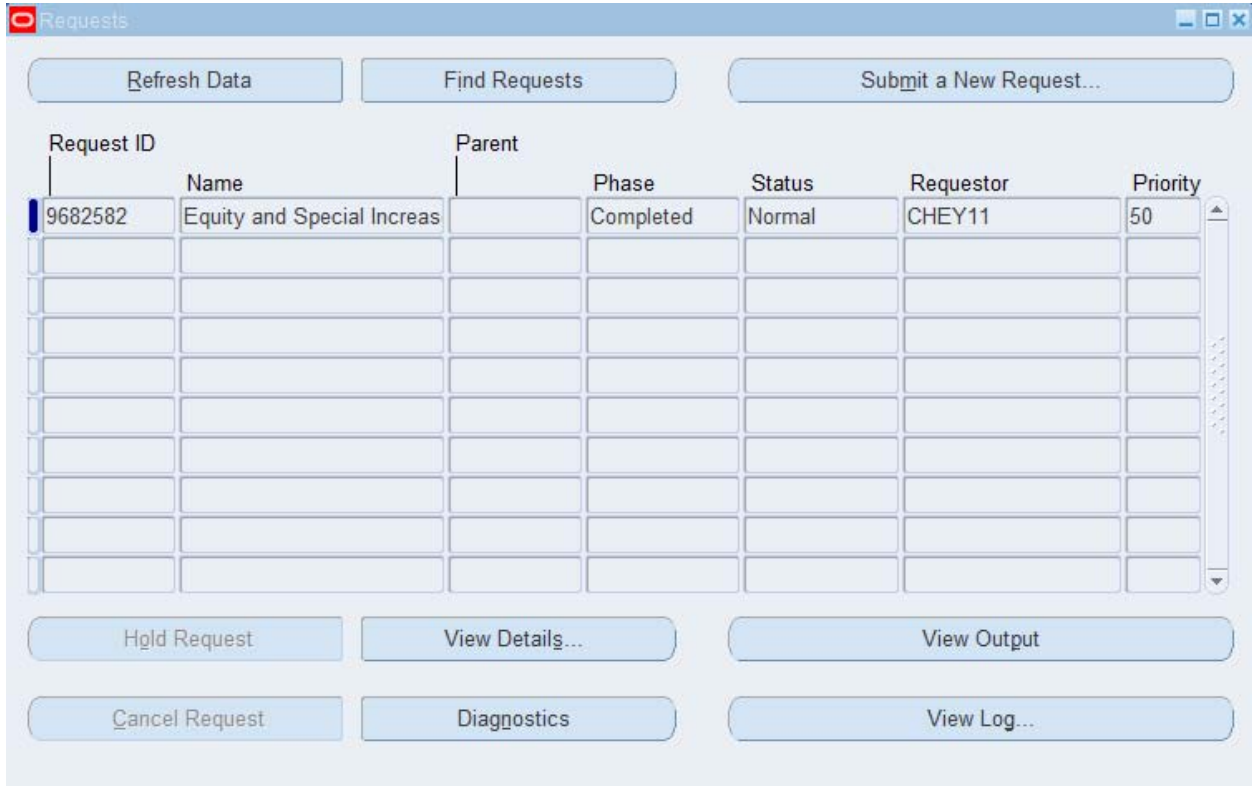
To view the form, double-click on “View” as shown below.



Then click on “Find”.




Place the cursor to the left of the desired “Request ID”, select it and click “View Output” to print the form. If the job is not completed, then press “Refresh Data” in the top left corner multiple times until completed is shown in the “Phase” column. In addition, make sure that in the “Status” column, displays the word “Normal”.



The screenshot shows a window titled "Requests" with a table of request data. The table has the following columns: Request ID, Name, Parent, Phase, Status, Requestor, and Priority. The first row is selected and contains the following data: Request ID: 9682582, Name: Equity and Special Increas, Parent: (empty), Phase: Completed, Status: Normal, Requestor: CHEY11, Priority: 50. Below the table are several buttons: Refresh Data, Find Requests, Submit a New Request..., Hgld Request, View Details..., View Output, Cancel Request, Diagnostics, and View Log...

Request ID	Name	Parent	Phase	Status	Requestor	Priority
9682582	Equity and Special Increas		Completed	Normal	CHEY11	50

After printing the form, obtain the appropriate signatures and submit the form to the Office of Budgets by the stated deadline date in the SALX Guidelines. Below is an example of a completed form that has been printed and is ready for signatures. Once submitted, do not make further updates electronically unless agreed to by the Office of Budgets.

		EQUITY AND SPECIAL INCREASE FORM		HRMSR322
		FISCAL YEAR 2018 - 2019		22-FEB-18 10:23 AM
Name	<input type="text"/>	Employee ID	<input type="text"/>	Primary Assignment Number <input type="text"/>
Department Number and Name	1271 Accounting			Admin Unit <input type="text" value="FA"/>
Salary Authority Department	<input type="text" value="1271"/>	Salary Authority Dept Name	Accounting	
Effective Date	<input type="text" value="01-JUL-2018"/>	People Group	Faculty	
Title	<input type="text" value="Associate Professor"/>		Employment Category	Regular
Current Base Salary \$	<input type="text" value="170,000"/>	Salary Basis	<input type="text" value="9 Month"/>	NTT Type <input type="text" value="Continuing"/>
Funding Sources and Percentages				
EG = 100% from 13xxxx				
Notes				
Proposed Merit Increase \$	<input type="text" value="4,000"/>	and %	<input type="text" value="4.0000"/>	Special Increase Request of \$1,000 (1%) should stay the same if the University Average Merit Increase % changes.
Equity Increase Request \$	<input type="text"/>	and %	<input type="text"/>	
Special Increase Request \$	<input type="text" value="1,000"/>	and %	<input type="text" value="1.0000"/>	
Total Increase \$	<input type="text" value="5,000"/>	and %	<input type="text" value="5.0000"/>	
Proposed Salary \$	<input type="text" value="105,000"/>			
Justification				
Outstanding service over the past 10 years in serving the needs of the department, particularly in the capacity as undergraduate coordinator. He is an award winning instructor at both the undergraduate and graduate level.				
Program/Service Impacts of this Reallocation				
Internal expenditure adjustments within the unit will be made to cover this salary investment.				

Department Approvals	_____	Date	_____
Dean/Vice President Approvals	_____	Date	_____
Provost/President Approval	_____	Date	_____
Central Review Process	_____	Date	_____

Questions?

For questions regarding the instructions described above, please send an email to the Helpdesk at salx_budget_office_helpdesk@colostate.edu.

Section D: Useful Information

The table below includes the major function keys that are used in SALX. Additionally, you may use the up and down arrow keys to scroll between records.

F11	Enter Query
Ctrl + F11	Execute Query
F4	Exit/Cancel
Ctrl + L	List of Values
Ctrl + S	Commit