

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

Supplement to the  
Salary Increase Exercise SALX Guidelines

**FY 2024-2025**

Updated March 1, 2024



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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.

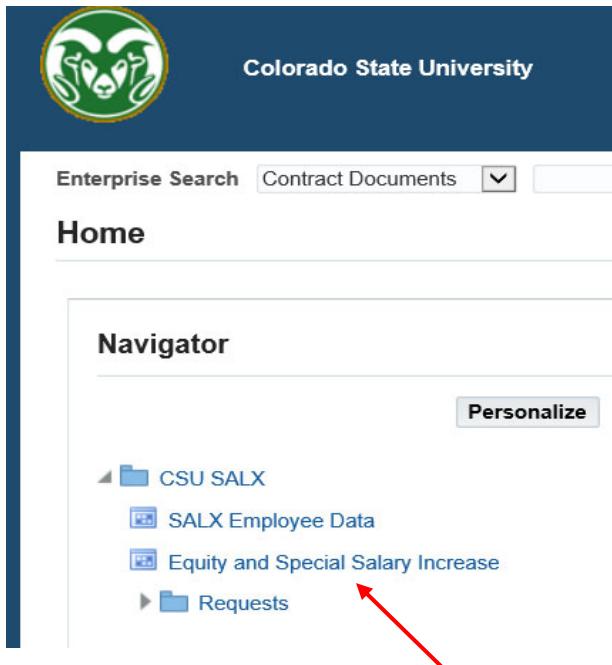
In order for this process to be successful, you must provide specific and succinct justifications and complete all required fields on the form. **Incomplete information will result in requests being rejected.**

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.

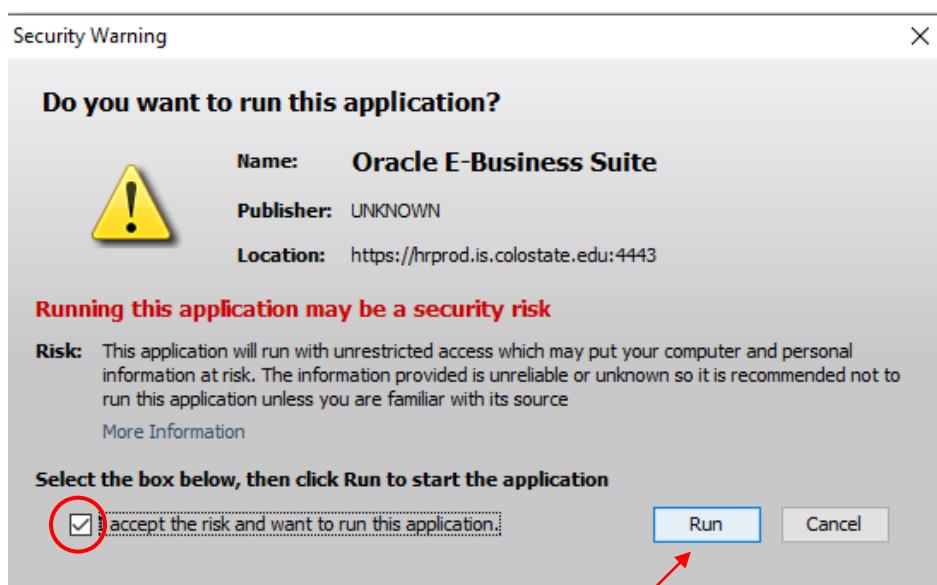
The screenshot shows a Windows application window titled "SALX Employee Data". Inside, a form is displayed with the title "CSUHF029" and "Salary Eligibility and Increase Exercise". The form includes several input fields and dropdown menus. At the top right, there is a red box containing the text "CHEY11".  
Fields include:  
- Pid: [redacted]  
- Exclude: [checkbox]  
- Salary Authority Dept: [redacted]  
- Admin Unit: [redacted]  
- Comments: [large text area]  
- Department Name: [redacted]  
- Base Salary: [redacted]  
- Employee Name: [redacted]  
- New Salary: [redacted]  
- Zero Increase in Salary?: [checkbox]  
- Salary Change: [redacted]  
- Job Class: [redacted]  
- Jobtitle: [redacted]  
- Merit Amt: [redacted]  
- Original BOS: [redacted]  
- Basis Of Service: [redacted]  
- Discipline/Individual Equity: [redacted]  
- Appt Type: [redacted]  
- CCA Type: [redacted]  
- Promotion Amount: [redacted]  
- Employee Type: [redacted]  
- Special Increase: [redacted]  
At the bottom, a key is provided:  
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 “Human Resources Portal” 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 2023 - 2024

|  |                            |                           |
|--|----------------------------|---------------------------|
| Name   | Employee ID                | Primary Assignment Number |
| Department Number and Name                   | Admin Unit                 |                           |
| Salary Authority Department                  | Salary Authority Dept Name |                           |
| Effective Date                               | July 1, 2023               | People Group              |
| Title  | Employment Category        |                           |
| Current Base Salary \$                       | Salary Basis               | CCA 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 |                            |                           |
| <input type="checkbox"/> 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.

The screenshot shows the 'REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM' window. The 'Name' field contains '%HALL' with a yellow background. Other fields include 'Employee ID' and 'Primary Assignment Number' with yellow backgrounds. The window title is 'Equity and Special Increase' and the form title is 'REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM'. The fiscal year is listed as 'FISCAL YEAR 2023 - 2024'. The document ID 'CSUHF040' is visible in the top right corner.

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

The screenshot shows the same form after the name has been entered. The 'Name' field now contains a yellow background. Other fields that have been populated include 'Department Number and Name' (1878 Biology), 'Admin Unit' (LA), 'Salary Authority Department' (yellow background), 'Salary Authority Dept Name' (yellow background), 'Effective Date' (July 1, 2023), 'People Group' (Faculty), 'Title' (Professor), 'Employment Category' (Regular), 'Current Base Salary \$' (116,978), 'Salary Basis' (9 Month), and 'CCA Type' (yellow background). The 'Funding Sources and Percentages' section is present but empty. The 'Notes' section is also empty. The 'Approved' checkbox at the bottom is unchecked.

## **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 in the HR System (ORACLE) 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 in the HR System (ORACLE), 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

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM CSUHF040  
FISCAL YEAR 2023 - 2024

Name [ ] Employee ID [ ] Primary Assignment Number [ ]  
Department Number and Name 1878 Biology Admin Unit LA  
Salary Authority Department 1878 Salary Authority Dept Name Biology  
Effective Date July 1, 2023 People Group Faculty  
Title Professor Employment Category Regular  
Current Base Salary \$ 116,978 Salary Basis 9 Month CCA Type [ ]  
Funding Sources and Percentages  
EG -100% from 13xxxxx

Proposed Merit Increase \$ 5,849 and % 5.0001 Notes  
Equity Increase Request \$ [ ] and % [ ]  
Special Increase Request \$ 2,000 and % 1.7097  
Total Increase \$ 7,849 and % 6.7098  
Proposed Salary \$ 124,827

Justification  
Outstanding service over the past 10 years in serving the needs of the department, particularly in the capacity of undergraduate coordinator. She is an award winning professor 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"><li>• Insignificant changes in job duties and/or increase in responsibilities only.</li></ul>  | <ul style="list-style-type: none"><li>• 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.</li></ul> |
| <ul style="list-style-type: none"><li>• Outstanding performance that cannot entirely be addressed through merit increase</li></ul>   | <ul style="list-style-type: none"><li>• Contract, continuing, or adjunct faculty member increase may be supported by data provided by the Chair/Head of an equity issue when compared to peers within the department.</li></ul>       |
| <ul style="list-style-type: none"><li>• Additional or completed education, training or degree</li></ul>  |   |
| <ul style="list-style-type: none"><li>• 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.</li></ul>  |   |
| <ul style="list-style-type: none"><li>• Salary compression – to correct issues where employees with more years of service are paid at a lower rate than peers that were hired later.</li></ul>   | <ul style="list-style-type: none"><li>• Salary compression – to correct issues where employees with more years of service are paid at a lower rate than peers that were hired later.</li></ul>  |
| <p><b>Note:</b> For major changes in job duties, increase in responsibilities, promotions beyond the official Promotion &amp; Tenure process, requests will require review and approval by the Office of Equal Opportunity and Human Resources through an updated position description in TMS by April 12<sup>th</sup> 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:

The screenshot shows a Windows application window titled "Equity and Special Increase". The main title bar reads "REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM" and "FISCAL YEAR 2023 - 2024". The window identifier "CSUHF040" is visible in the top right corner. The interface is divided into several sections:

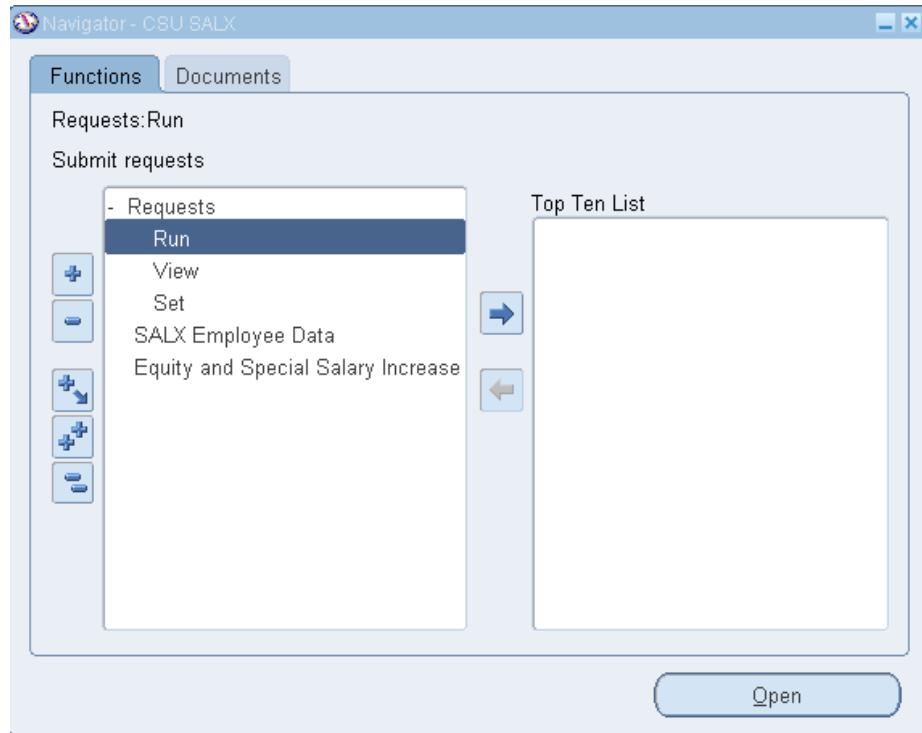
- Top Row:** Name (white input field), Employee ID (white input field), Primary Assignment Number (white input field).
- Middle Left:** Department Number and Name (blue input field), Admin Unit (blue input field).
- Middle Center:** Salary Authority Department (white input field), Salary Authority Dept Name (blue input field).
- Middle Right:** Effective Date (blue input field showing "July 1, 2023"), People Group (blue input field).
- Bottom Left:** Title (blue input field), Employment Category (blue input field).
- Bottom Center:** Current Base Salary \$ (blue input field), Salary Basis (blue input field), CCA Type (blue input field).
- Section Headers:** "Funding Sources and Percentages" (white label), "Notes" (white label), "Justification" (white label), and "Program/Service Impacts of this Reallocation" (white label).
- Bottom Right:** A checked checkbox labeled "Approved".

### Searching for a Record

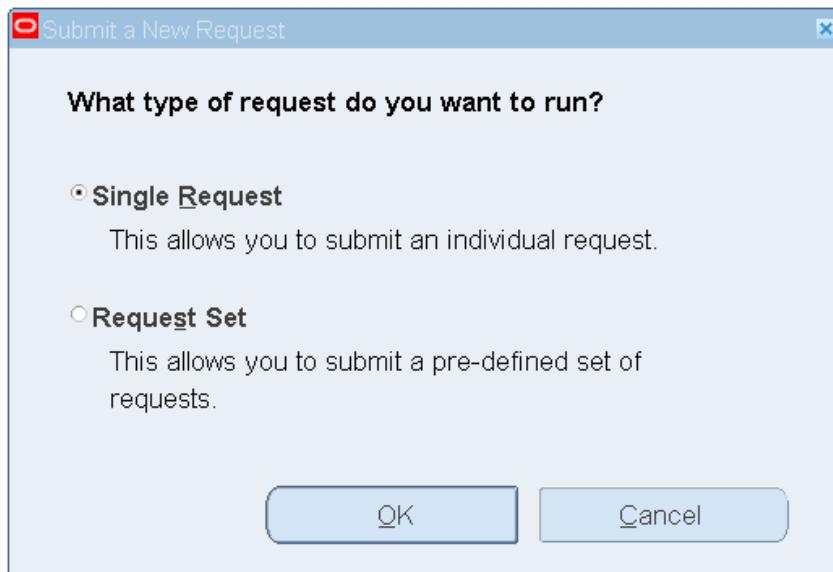
To search for a record, input Name, Employee ID or Primary Assignment Number and press **Ctrl+F11** to retrieve records already created. Once in the record, the user can update the form. Be sure to **SAVE** any changes. To view all the records you have access to, use “%” in the Name field and press **Ctrl+F11**.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

## Section C: Printing the Form to Route for Approvals

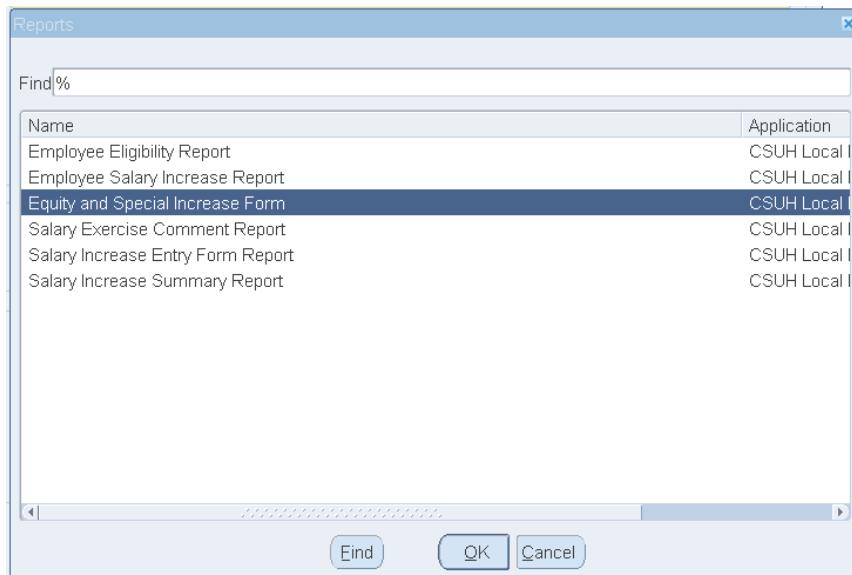
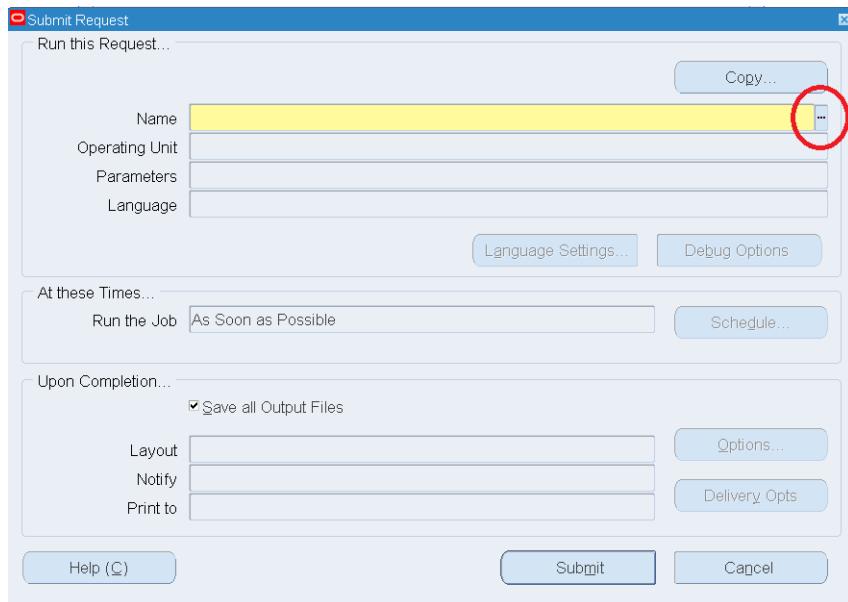
The next step is to print the form and route it for approvals. In order to print the form, you need to exit the “Equity and Special Salary Increase” window. This can be done by pressing F4 or clicking the “X” in the top right-hand corner of the form. Once in the SALX main menu, double click on “Requests”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



Select Single Request and click “OK”.

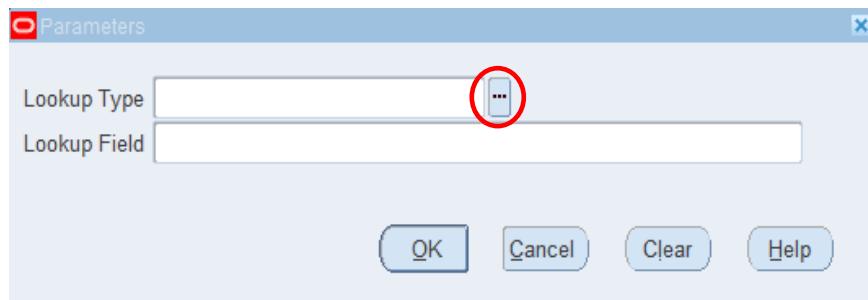


To print the request, under the “Name” field, click on the ellipsis “...” and select Equity and Special Increase Form.

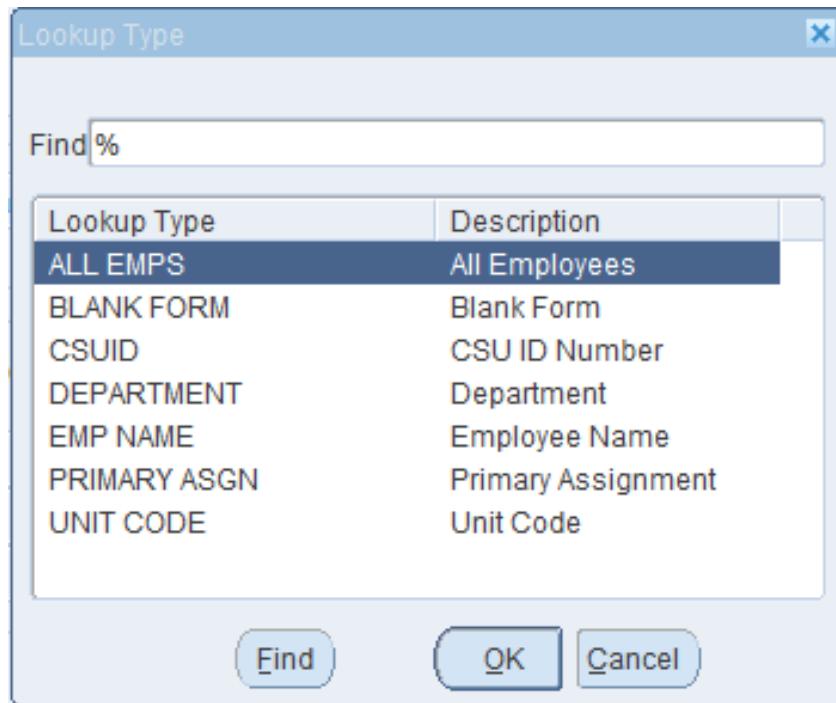


After the user has selected to print the equity/special report, select a “lookup type” from the drop down box options and input the appropriate information in the “lookup field”. Both of these fields need to be completed in order to print Equity/Special Request forms. The only time when the “lookup field”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

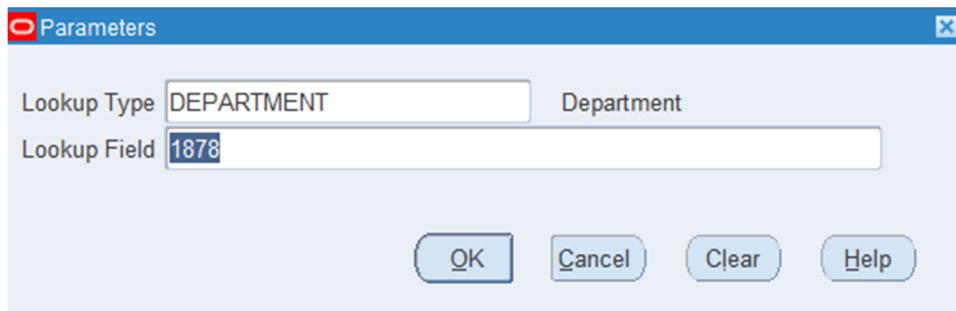
**NOTE:** The wildcard sign “%” should not be utilized when typing information in the Lookup Field (e.g., if the lookup type is employee name, do not put the first letter and then “%” as this will not yield any results). Instead, write out the employees’ name as it appears in the SALX employee data screen.



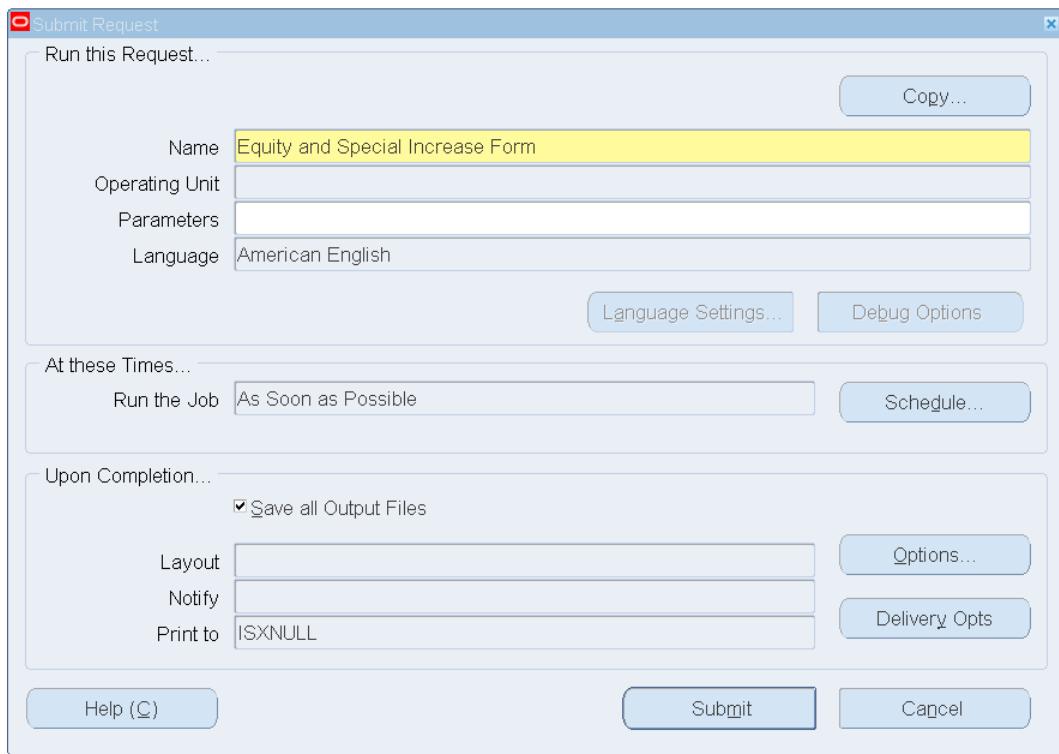
Click on the ellipsis “...” next to the “lookup type” box (in above screen) and you will get the below screen. Based on what “lookup type” you choose will be what you put in the “lookup field”.



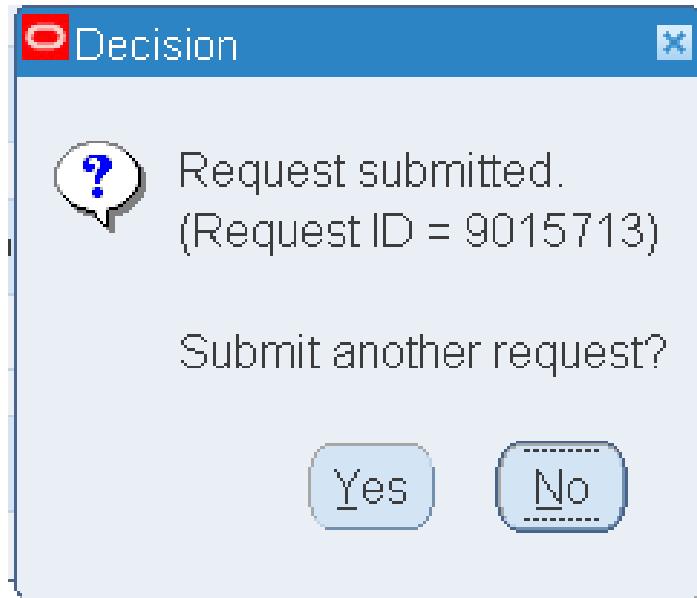
For example, if DEPARTMENT is selected from the “lookup type” display, enter the department number to be printed in the “lookup field” box. Once the selection is made, click “OK”.



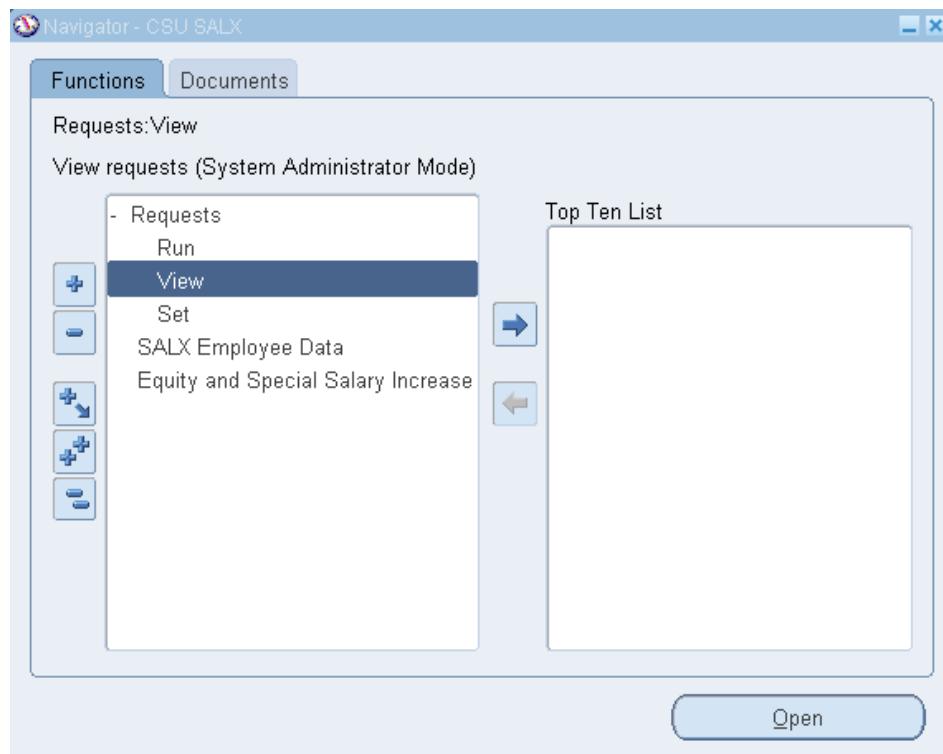
Then click “Submit”.



Select “No”.



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



Then click on “Find”.

The screenshot shows the 'Find Requests' dialog box. It has several search criteria fields:

- Radio buttons for: "My Completed Requests", "My Requests In Progress", "All My Requests" (which is selected), and "Specific Requests".
- "Request ID" input field.
- "Name" input field.
- "Date Submitted" input field.
- "Date Completed" input field.
- "Status" dropdown menu.
- "Phase" dropdown menu.
- "Requestor" input field.

Below these fields are two buttons:

- "Include Request Set Stages in Query"
- "Order By" dropdown menu set to "Request ID".

At the bottom of the dialog box are three buttons:

- "Select the Number of Days to View:" followed by a text input field containing the value "7".
- "Submit a New Request..."
- "Clear"
- "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”.

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.

| <b>EQUITY AND SPECIAL INCREASE FORM</b>   |                    |   |                 |
|---|--------------------|---|-----------------|
| <b>FISCAL YEAR 2023 - 2024</b>  |                    |   |                 |
| <b>Name</b>   | <b>Employee ID</b> | <b>Primary Assignment Number</b>          | HRMSR322        |
| <b>Department Number and Name</b> 1878 Biology  |                    | <b>Admin Unit</b> LA                      |                 |
| <b>Salary Authority Department</b> 1878   |                    | <b>Salary Authority Dept Name</b> Biology |                 |
| <b>Effective Date</b> 01-JUL-2023   |                    | <b>People Group</b> Faculty               |                 |
| <b>Title</b> Professor  |                    | <b>Employment Category</b> Regular        |                 |
| <b>Current Base Salary \$</b> 116,978   |                    | <b>Salary Basis</b> 9 Month               | <b>CCA Type</b> |
| <b>Funding Sources and Percentages</b><br>EG -100% from 13xxxxx   |                    |   |                 |
| <b>Notes</b>  |                    |   |                 |
| <p><b>Proposed Merit Increase \$</b> 5,849 <b>and %</b> 5.0000</p> <p><b>Equity Increase Request \$</b> _____ <b>and %</b> _____</p> <p><b>Special Increase Request \$</b> 2,000 <b>and %</b> 1.7100</p> <p><b>Total Increase \$</b> 7,849 <b>and %</b> 6.7100</p> <p><b>Proposed Salary \$</b> 124,827</p> |                    |   |                 |
| <b>Justification</b><br>Outstanding service over the past 10 years in serving the needs of the department, particularly in the capacity of undergraduate coordinator. She is an award winning professor at both the undergraduate and graduate level.   |                    |   |                 |
| <b>Program/Service Impacts of this Reallocation</b><br>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](mailto: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         |