

**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



Table of Contents

Overview:	2
When and why to request an equity or special salary increase for an employee?.....	2
Excel Template for Numerous Requests.....	2
Section A: Accessing and Creating the Equity/Special Increase Form	3
Creating a New Record	5
Salary Authority Departments.....	6
Incorrect Salary Authority Department	6
No Entry in Salary Authority Department	6
SALX Coordinator's Responsibilities.....	8
Helpful Reminders	8
Acceptable Justifications.....	8
Section B: Viewing/Updating Existing Records	9
Create Mode and Query Mode.....	9
Searching for a Record.....	9
Section C: Printing the Form to Route for Approvals	10
Questions?	16
Section D: Useful Information	17

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.

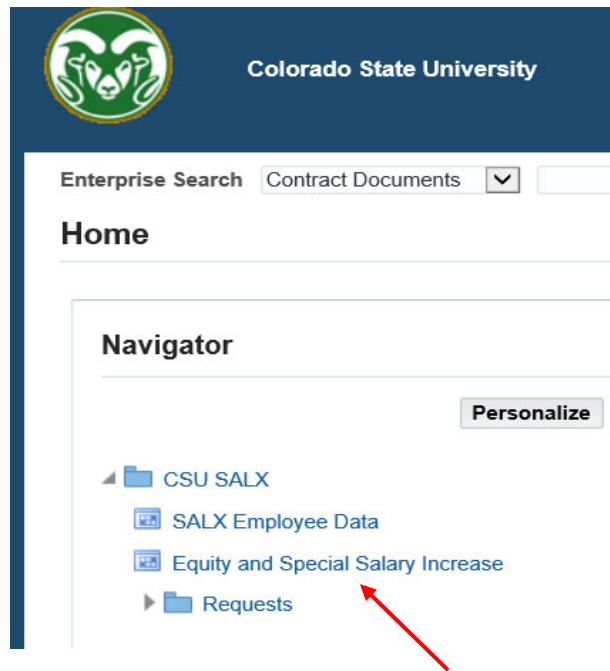
In order for this process to be successful, you must provide specific and succinct justifications and complete all required fields on the form. **Incomplete information will result in requests being rejected.**

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.

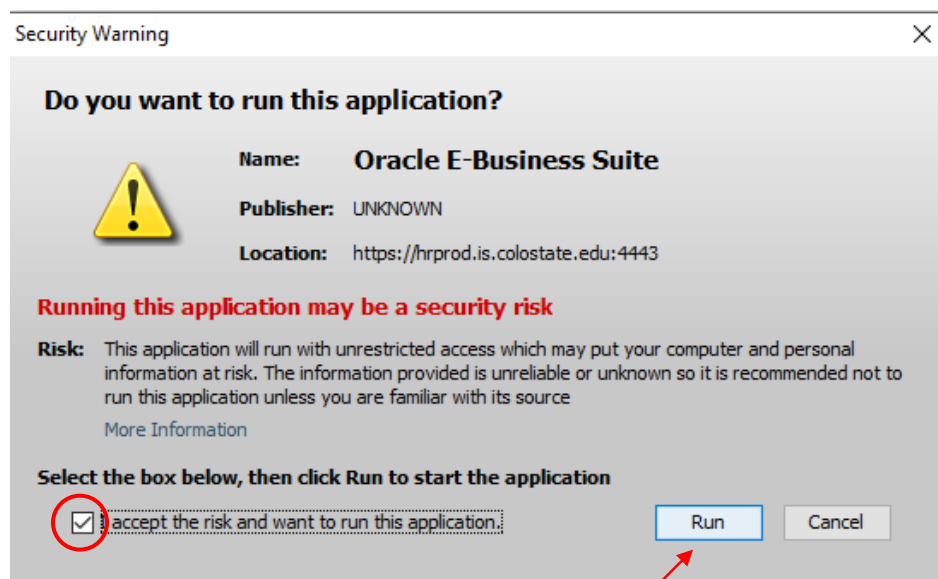
The screenshot shows a web-based form titled "CSUHF029 Salary Eligibility and Increase Exercise". The form is divided into several sections for data entry. At the top, there are fields for "Pid:", "Exclude:" (with a checkbox), "Salary Authority Dept:", and "Admin Unit:". Below these is a large "Comments:" text area. The main body of the form contains fields for "Department Name:", "Employee Name:", "Base Salary:", "New Salary:", "Zero Increase in Salary?:" (checkbox), "Salary Change:", "Job Class:", "Jobtitle:", "Merit Amt:", "Original BOS:", "Basis Of Service:", "Discipline/Individual Equity:", "Appt Type:", "CCA Type:", "Promotion Amount:", "Employee Type:", and "Special Increase:". At the bottom, a "KEY" section provides instructions: "F11 = Enter Query", "Ctrl + F11 = Execute Query", and "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

☐ 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 top portion of a web form titled "REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM" with the identifier "CSUHF040". Below the title, the "FISCAL YEAR" is set to "2023 - 2024". The "Name" field contains the text "%HALL" followed by a dropdown arrow. The "Employee ID" and "Primary Assignment Number" fields are empty. The form has a blue header bar with the text "Equity and Special Increase".

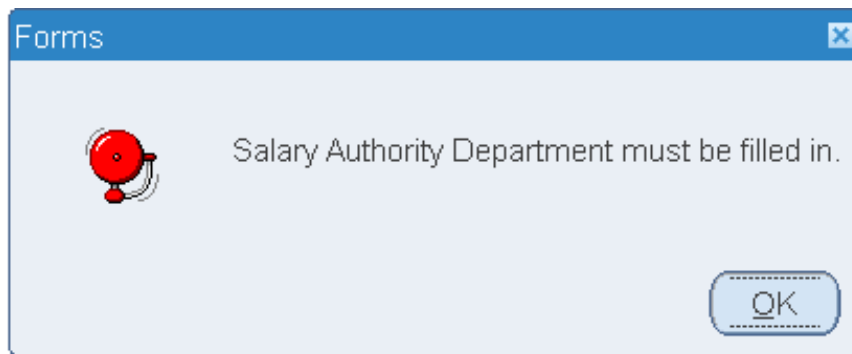
After the name has been selected, the remaining fields will auto populate (see dark blue highlighted fields in form below).

This screenshot shows the same form after the name "%HALL" has been selected. The following fields are auto-populated and highlighted in dark blue: "Employee ID", "Primary Assignment Number", "Department Number and Name" (1878 Biology), "Admin Unit" (LA), "Salary Authority Dept Name", "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". The "Funding Sources and Percentages" section is a large empty text box. Below this, there are fields for "Proposed Merit Increase \$", "Equity Increase Request \$", "Special Increase Request \$", "Total Increase \$", and "Proposed Salary \$", each followed by "and %" and a small input field. To the right of these is a "Notes" section with a large text box. At the bottom, there is a "Justification" section with a large text box, followed by "Program/Service Impacts of this Reallocation" with another large text box. A checkbox labeled "Approved" is at the bottom right.

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):

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 13xxxx			
Proposed Merit Increase \$		5,849	and % 5.0001
Equity Increase Request \$			and %
Special Increase Request \$		2,000	and % 1.7097
Total Increase \$		7,849	and % 6.7098
Proposed Salary \$		124,827	
Notes			
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.			
<input type="checkbox"/> 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">• 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.
<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.
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 an updated position description in TMS by April 12 th 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.	

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:

Equity and Special Increase CSUHF040

REQUEST FOR EQUITY AND SPECIAL SALARY INCREASE FORM

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 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

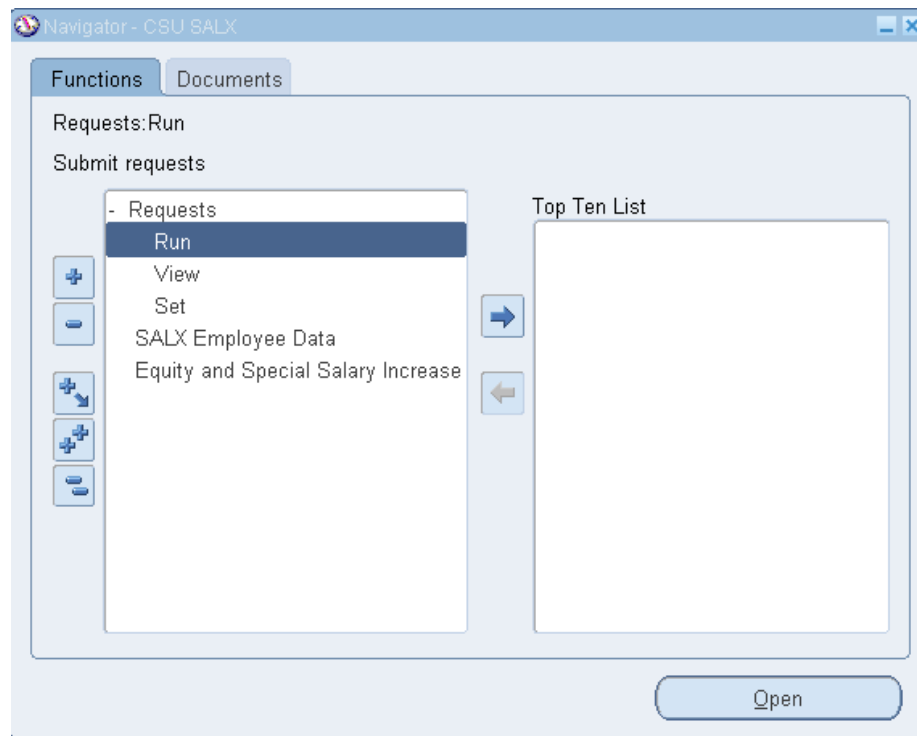
☒ Approved

Searching for a Record

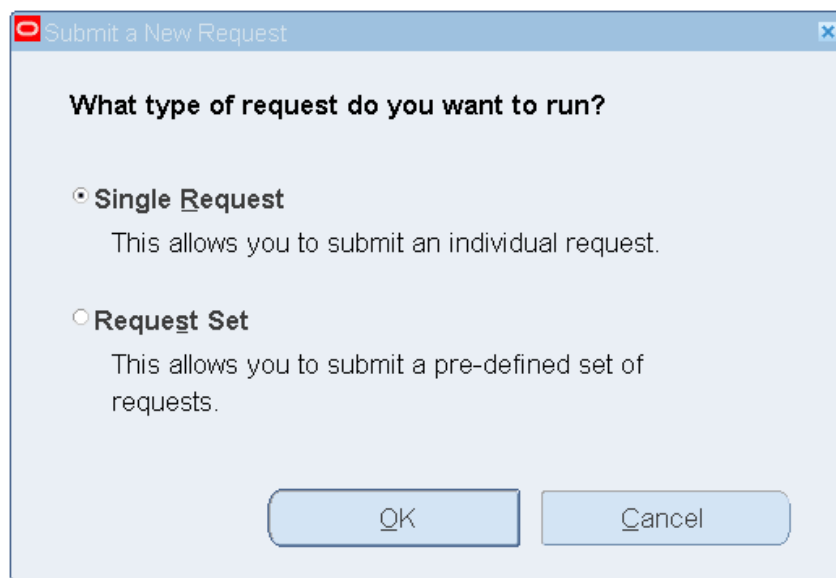
To search for a record, input Name, Employee ID or Primary Assignment Number and press **Ctrl+F11** to retrieve records already created. Once in the record, the user can update the form. Be sure to **SAVE** any changes. To view all the records you have access to, use “%” in the Name field and press **Ctrl+F11**.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

The Parameters dialog box has a title bar with a red icon and a close button. It contains two text input fields: "Lookup Type" and "Lookup Field". The "Lookup Type" field has a small ellipsis button "..." to its right, which is circled in red. At the bottom, there are four buttons: "OK", "Cancel", "Clear", and "Help".

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”.

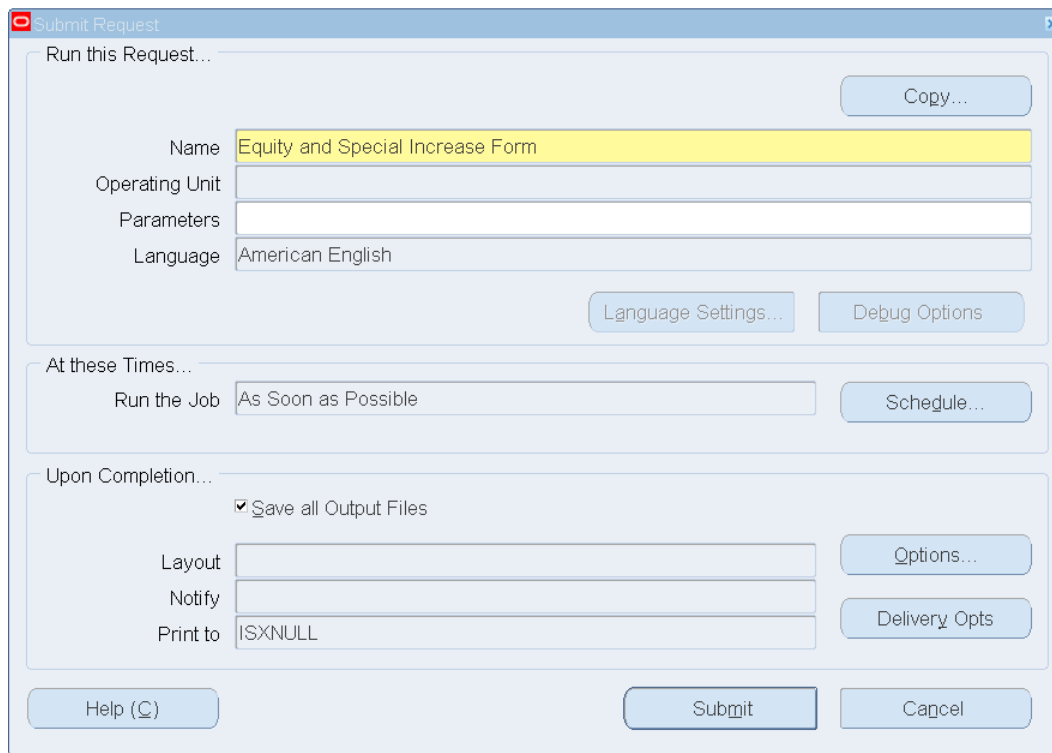
The Lookup Type dialog box has a title bar with a close button. It features a search field labeled "Find %". Below it is a table with two columns: "Lookup Type" and "Description". The table lists several options, with "ALL EMPS" currently selected. At the bottom, there are three buttons: "Find", "OK", and "Cancel".

Lookup Type	Description
ALL EMPS	All Employees
BLANK FORM	Blank Form
CSUID	CSU ID Number
DEPARTMENT	Department
EMP NAME	Employee Name
PRIMARY ASGN	Primary Assignment
UNIT CODE	Unit Code

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”.

The Parameters dialog box now shows "DEPARTMENT" in the "Lookup Type" field and "1878" in the "Lookup Field" field. The "Lookup Type" field also has a small "Department" label to its right. The buttons at the bottom remain "OK", "Cancel", "Clear", and "Help".

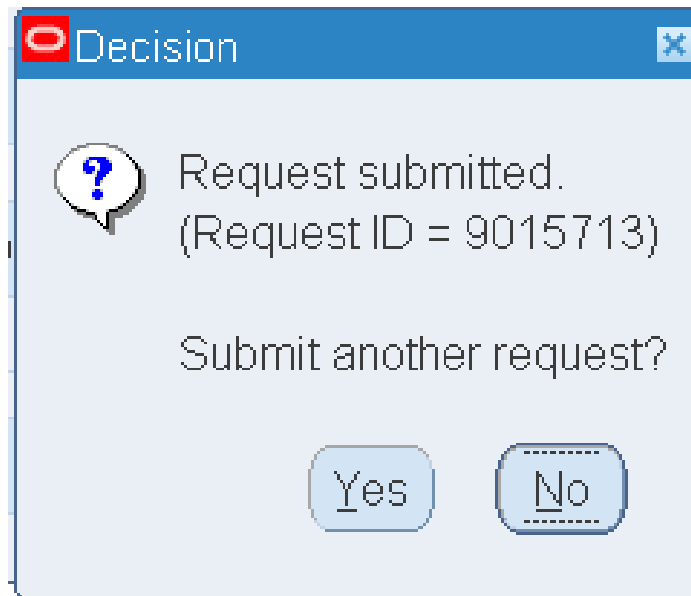
Then click “Submit”.



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

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

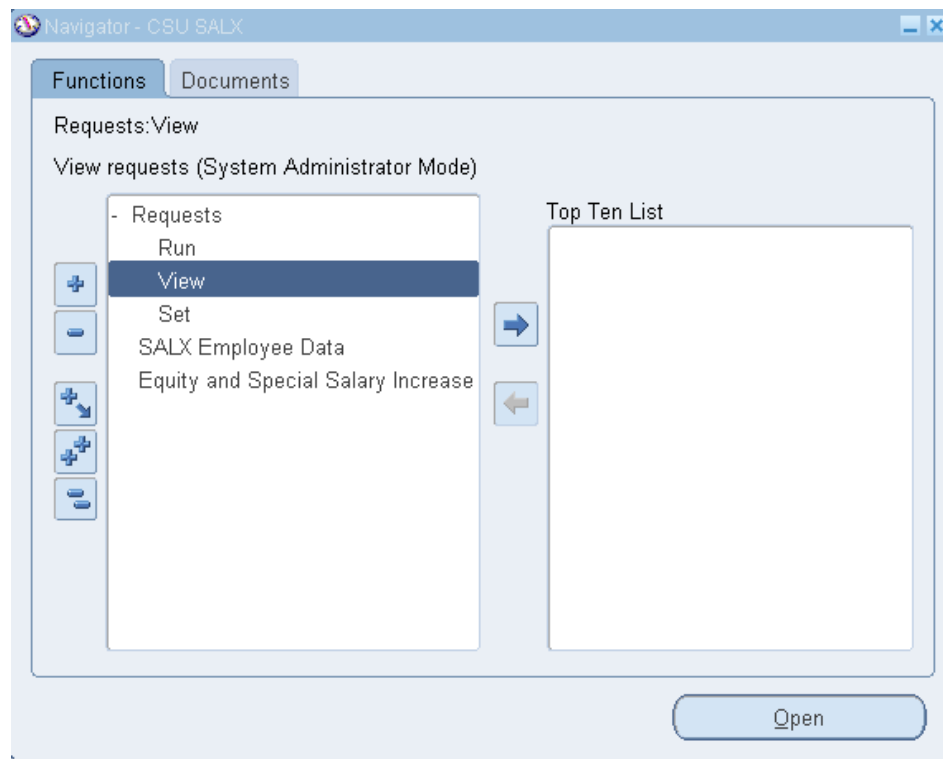
Select “No”.



The 'Decision' dialog box displays the following information:

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

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



Then click on “Find”.

The screenshot shows a dialog box titled "Find Requests". It contains several radio buttons for selection: "My Completed Requests", "My Requests In Progress", "All My Requests" (which is selected), and "Specific Requests". Below "Specific Requests" is a group box containing input fields for "Request ID", "Name", "Date Submitted", "Date Completed", "Status" (a dropdown menu), "Phase" (a dropdown menu), and "Requestor". Below this group box is a checkbox labeled "Include Request Set Stages in Query". Below that is an "Order By" dropdown menu currently set to "Request ID". At the bottom, there is a label "Select the Number of Days to View:" followed by a text input field containing the number "7". At the very bottom are three buttons: "Submit a New Request...", "Clear", and "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 standard Windows-style title bar. Inside the window, there are three buttons at the top: "Refresh Data", "Find Requests", and "Submit a New Request...". Below these is a table with the following columns: "Request ID", "Name", "Parent", "Phase", "Status", "Requestor", and "Priority". The first row of the table contains the following data: Request ID: 9682582, Name: Equity and Special Increas, Parent: (empty), Phase: Completed, Status: Normal, Requestor: CHEY11, Priority: 50. There are several empty rows below the first one. To the right of the table is a vertical scrollbar. Below the table, there are two rows of buttons. The first row contains "Hold Request", "View Details...", and "View Output". The second row contains "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.

Colorado State University		EQUITY AND SPECIAL INCREASE FORM		HRMSR322	
		FISCAL YEAR 2023 - 2024		28-FEB-23 10:44 AM	
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	01-JUL-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					
Notes					
Proposed Merit Increase \$	5,849	and %	5.0000		
Equity Increase Request \$		and %			
Special Increase Request \$	2,000	and %	1.7100		
Total Increase \$	7,849	and %	6.7100		
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.					

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