



Colorado State University

Salary Raise Exercise (SALX) Training

Colorado State University
March 27-29, 2018
9:30 am - 11:30 am

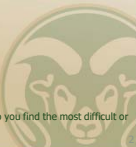
Please sign in on attendance sheet!

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Welcome to SALX Training

- **Introductions**
- **At your computer, you should have:**
 1. Presentation Slides
 2. SALX Checklist
 3. SALX Handouts 1, 2, and 3
 4. Evaluation Form

Poll: Based on what you know about SALX, what do you most look forward to?
Poll: For those of you that have been involved with SALX for a number of years, which part of SALX do you find the most difficult or time consuming to accomplish?



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Overview

Processes Impacting SALX

Equity & Special Increase Form

Situations Requiring Special Attention

Tools



Checklist and Other Related Issues


Demonstrations: Using SALX

Reports

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SALX Overview

- **Housed in HR**
- The Salary Raise Exercise (SALX) is the mechanism by which colleges, departments, and units enter salary increases for the new fiscal year.



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Poll: What people group does SALX include?



Does Include:

- Faculty
- Administrative Professional
- Senior Teaching Appointments
 - Subgroup of above
 - See appointment type "X"



Does not include:

- State Classified
- Post Doctoral Fellows
- Professional Interns
- Graduate Assistants
- Student Hourly and Work-Study
- AP Hourly



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Components Added to SALX

Promotion & Tenure

Equity & Special Increases



SALX
Salary Raise Exercise

March 21st HR Information
 SALX



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March 21st HR Information  SALX

Out of Cycle Increases

Changes in Oracle HR

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Processes Impacting SALX

- **Freeze Out of Cycle Increases**
 - March 1 through July 1
- **Equity & Special Increase Requests** (if needed)
 - March 1 through April 10
 - Requires merit increase to be university average merit % (2.5%) not the college / department average merit %
 - Complete justification based on individual situation. *Generic statements not acceptable. Be precise – only 240 character limit.*
 - SALX Coordinators check requests to make sure rules are followed *BEFORE* submitting to VP.

When is an Alternative Appointment Request (AAR) required?

Last update: 1/29/2013

Required	Not Required *
<ul style="list-style-type: none"> • Change in Classification (e.g. Prof/Indiv Contrib I to a Prof/Indiv Contrib II) • Change to Employment Category (moving to or from Regular) • Change in Employee Group from Admin Professional to Faculty or vice versa (State Classified Conversions not included) • Employee moving to completely new position • Employee Reappointment/ Reinstatement • Promotion Research Associate series - RA III to RA IV to Senior • Promotion Research Scientist/Scholar - RS II to RS III to Senior • Promotion Research Associate and Research Scientist/Scholar skipping levels 	<ul style="list-style-type: none"> • Change in Working Title only (e.g. Assistant Director to Assistant Director of Community Development) • Change to Employment Category (Special to Temporary or vice versa) • Change to salary only • Promotion Research Associate series - RA I to RA II to RA III • Promotion Research Scientist/ Scholar - RS I to RS II • Change to duties and/or responsibilities only • Position placed in AP Framework

* If any of these changes result in a new position version number (e.g. 0001 to 0002), this will require an Oracle action to finalize the change.

If you have any questions, please contact the Office of Equal Opportunity at oeo@colostate.edu or (970)491-5836

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Equity & Special Increase Form

Poll: Is Central funding provided for any equity or special increases?

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Situations Requiring Special Action

- **Changes Processed in HR after SALX Snapshot**
- **Multiple/Concurrent Assignments**
 - Use comments to explain raise details for non-primary assignments. Provide assignment number, % of increase, amount of increase, what kind of increase (e.g. merit, special, equity, etc.) and effective date if different than July 1. (see example below)

- If nothing indicated in Comments, off-cycle paperwork is required.

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Tools for

Poll: Of all the handouts and trainings provided, what is the most beneficial?


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Tools: Reference Documents


SALX Guidelines




User Documentation



Equity & Special Procedures



Handouts 1, 2, and 3



Category	Definition	Eligible Employee Group	Pre-Approval	Pre-Approval Request Deadline	Notification Date of Approvals by Provost/VP	Fund Source	SALX Field
Merit	Increase based on performance evaluation	All	No	N/A	N/A	Units receive set % of increase for E&G funds only	Merit Amt
Equity Increase	Increase based on comparison with other salaries in the same unit. For tenure-track/tenured faculty member, use the Equity Study data provided by Institutional Research.	All <i>Mostly for tenured/tenure track faculty</i>	Yes Unless coming from merit pool 5	April 10	April 30	Unit's internal resources and/or reallocations. No central funding.	Disc/Indiv Equity (unless from Merit pool 5, then insert in merit amt and provide comments)
Special Increase	Individually justified adjustments that cannot be accomplished through the regular merit/equity process	All	Yes	April 10	April 30	Unit's internal resources and/or Reallocations. No central funding.	Special Increase
Promotion	Results of promotion and tenure process	Regular tenure-track academic appointment	President Approves early May	N/A	N/A	Central Funding	Promotion
Promotion Others	Results of promotion	Special research and academic appointment	President Approves early May	N/A	N/A	Unit's internal resources	Promotion

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SALX User Documentation

- Accessing SALX
- View or Change Employee Data Screen
- Modifying Employee Salary Information
- Field Definitions
- Reports
- Appendix A: Using SALX Screens
- Appendix B: Icon Descriptions / Function Keys and Usage

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Before Training: SALX Processes

- **Updated HR**
 - Cleaned up Salary Authority Department numbers in January
 - Moved department heads to Dean's dept.
- **New hires** if fully approved in HR by March 21
- **State Classified to Administrative Professional Conversions** effective April 1

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After Training: SALX Processes

Pol: If you update a Salary Authority Department in SALX will it be updated in Oracle HR as well?

- **Salary Authority Department**
 - Responsible for assigning employee raise in SALX
 - Different from the HR Assignment Dept. for some (e.g. VP's, Deans, Department Heads, Directors)
- **Validate Salary Authority Department**
 - If incorrect, fix in both SALX and HR
- **Eligibility Process** - March 27 through April 9
 - Identify & Verify who should be considered for a salary increase
 - Include vs. Exclude

Pol: If someone is missing from the eligibility lists for one of your departments but they show up in another department that you also have access to, what do you have to do to get the record changed?

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Tools: Control Numbers

Salary Increase Exercise Control Numbers for FY 18-19

Unit: College of _____

Eligibility Salary Base	
Regular Appointments (Faculty and Admin Professional)	10,500,000
Special and Temporary Appointments (Faculty and Admin Professional)	3,800,000
Total	\$ 14,300,000
Authority Rate Increases Available for Distribution	
Merit Increases	407,500 2.5000%
Centrally Funded Promotional Increases**	56,000
Non-Centrally Funded Promotional Increases***	-
New University Distinguished Professor/Teaching Scholar	7,500
Special Increases - Pre-Approved	3,250
Equity Increases - Pre-Approved	1,500
Total Rate Authority	\$ 475,750 2.0187%

** Promotions: Budget Department

SALX Control Numbers

- SALX Control Numbers = Sum of Eligible Faculty & Admin Pro Annual Salary Base Amount dollars x University Average Merit % + Other Pre-approved Components.
 - Fund source is ignored, looking at whole person
 - Units do NOT receive base increases to EG sub-fund budgets based on increases assigned to employees during the SALX. The SALX process has nothing to do with the budget process.
 - Dept/College/VP responsible for working out details on how raises will be funded from existing fund sources within units.

Pol: If an employee is a part time employee, does that individuals part time salary or their annual full time salary get pulled in to SALX?

Handout 1: Control Number sheet

- Office of Budgets sends to highest level (Dean/VP) and Coordinators
- SALX Coordinators enters merit increases into system and the rest is populated for you

Control numbers are SALX-related only!

Salary Increase Exercise Control Numbers for FY 18-19		
Single Department		
Unit: College of		
Eligible Salary Base		
Faculty Appointment: (Faculty and Admin Professional)	10,700,000	
Special and Temporary Appointment: (Faculty and Admin Professional)	1,000,000	
Total	\$ 11,700,000	
Salaries: Rate Increases Available for Distribution		
Merit Increases	497,200	
Control: Faculty Professional Services**	86,000	
Total Control: Faculty Professional Services**	86,000	
New Tenure-Track: Disappointed Professor/Teaching Scholars	7,000	
Special Increases: Pre-Approved	2,300	
Equity Increases: Pre-Approved	2,300	
Total Rate Increases	\$ 675,800	
18% Provisional		
The provision amount goes to the sub-fund identified below. *Faculty is higher. **Faculty is higher. ***Faculty is higher. ****Faculty is higher. *****Faculty is higher. *****Faculty is higher. *****Faculty is higher.		
Faculty: Merit	Professional	14,000
Faculty: Special	Assistant Professor	14,000
Faculty: Tenure	Assistant Professor	14,000
Faculty: Equity	Professional	14,000
Total Provisional	Professional	\$ 56,000
18% Other Provisional Services		
Do Not Report/Other: Control: Tenure Track Faculty or Administrative Professional Staff which will not be funded centrally through the Education and Student Team		
Faculty: Merit	Professional	7,000
Faculty: Special	Assistant Professor	7,000
Faculty: Tenure	Assistant Professor	7,000
Faculty: Equity	Professional	7,000
Total Other Provisional Services	Professional	\$ 28,000
New Tenure-Track: Disappointed Professor/Teaching Scholars		
Book: Disappointed	Professional	7,000
Total New Tenure-Track: Disappointed Professor/Teaching Scholars	Professional	\$ 7,000
Special Increases: Pre-Approved and Equated in MGS		
Faculty: Merit	Assistant Professor	2,300
Faculty: Special	Assistant Professor	2,300
Total Special Increases	Assistant Professor	\$ 4,600
Equity Increases: Pre-Approved and Equated in MGS		
Faculty: Merit	Assistant Professor	2,300
Total Equity Increases	Assistant Professor	\$ 2,300

Handout 2: Raise Base sheet

EG FY 18 Raise Base for FY 19 Budget Allocation Process for Tenured/Tenure Track Faculty, Administrative Professional and Graduate Assistants

SAMPLE DOCUMENT

No relationship to SALX Control Numbers.
Each College/VP to work out details of how raises will be funded from existing fund resources within units.

	Sample for College
FY 18 Tenured/Tenure & Faculty Raise Base	5,260,000
FY 18 Admin Pro Raise Base (from Budget Construction)	1,100,000
Total Combined Raise Base for Faculty and Admin Prof Staff	6,360,000
x 2.3% Salary Increase	149,200
FY 18 Graduate Assistant Raise Base (from Budget Construction)	212,000
x 2.5% Salary Increase	5,300
Total FY 18 Raise Base-Combined T/TT, AP, GA	6,736,300

EG Sub-fund only

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Handout 3:

Budget Allocation sheet

- Budget Construction, not SALX
- State Appropriated sub-funds

2018-2019 Budget Allocations
SAMPLE DOCUMENT

College of

EG (13) Sub-Fund	
2017-18 Operating Budget	6,700,000
Deduct FY18 Miscellaneous Revenue	(12,000)
Deduct FY18 BA/RSP Initial Allocation	(600,000)
Deduct FY18 Course/Teach Fees	(280,000)
2017-18 Base Budget	5,878,000
Permanent Base Changes	100,000
Adjusted Base	5,978,000
2018-19 Budget Allocations:	
FACULTY/APP Salary Increases	178,000
State Classified Increases	95,500
Faculty Promotions	56,000
Graduate Assistant Merit Increases	6,200
Previous Faculty Commitments	50,000
Subtotal	203,200
EG (13) Subfund Base Budget	6,181,200
ADD 2018-19 Miscellaneous Revenue	12,000
ADD 2018-19 Differential Tuition (2-Bonus 4344)	220,000
Total EG (13) Subfund	6,369,340
BA/RSP (14) Sub-Fund - Initial 90% Allocation	
Total BA/RSP (14) Subfund	600,000
COURSE (21) Sub-Fund	
Technology Charges	278,000
Course Fees	320,000
Total COURSE (21) Subfund	598,000
2018-19 Operating Budget	7,509,340

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Salary Increase Expense Control Numbers for FY 18-19
Sample Document

Faculty Salary	
Base Salary	11,200,000
Step	2,000,000
Merit	1,000,000
Total Faculty Salary	14,200,000
Faculty/APP Salary Increases	
Faculty/APP Salary Increases	178,000
Graduate Assistant Merit Increases	6,200
Faculty Promotions	56,000
State Classified Increases	95,500
Previous Faculty Commitments	50,000
Total Faculty/APP Salary Increases	385,700

2018-2019 Budget Allocations
SAMPLE DOCUMENT

College of

EG (13) Sub-Fund	
2017-18 Operating Budget	6,700,000
Deduct FY18 Miscellaneous Revenue	(12,000)
Deduct FY18 BA/RSP Initial Allocation	(600,000)
Deduct FY18 Course/Teach Fees	(280,000)
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2018-19 Operating Budget	7,509,340

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SALX Control Number

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Budget Allocation Control Number

\$407,500 \$159,000

HANDOUT 1: SALX Control Number includes ALL eligible Faculty/AP for your college/unit

HANDOUT 3: Budget Allocation Sheet includes EG Faculty/AP for your college/unit

- Admin Professional** = Budgeted amount in BC
Budget pools 5100 & 5108
- Faculty** = Raise Base for colleges
Distributed in Budget Allocation packet
- Faculty** = Non-college areas budgeted amount in BC
Budget pools 5000, 5008, & 5200

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Tools: Critical Dates

2018-19 Salary Increase Guidelines

2018-19 Salary Increase Guidelines - Critical Dates

Date	Primary Contacts and Participants	Activities/Requirements
January 3	Office of Budgets & Colleges/Units	Identify college/dept. persons (coordinators) who will input salary exercise information into SALX and will require training.
Mid Jan-Feb	Central Administration	Discussions regarding salary exemptions, % of merit increase, if allowing special equity requests, etc.
February 1	Colleges/Units	Deadline to submit Off-Cycle raises
February 1 - 29	Office of Budgets & SALX Coordinators	Update HR in preparation for salary exercise. 1. Office of Budgets will provide a list of faculty/employee records for SALX Coordinators to review. 2. Colleges/Units responsible for verifying/entering information: • Salary Authority department numbers are correct for individuals. • All department heads are on Dean's list, etc.

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Timeline

Date	Description
March 1 - July 1	Freeze Off-Cycle Salary Increases
March 1	SALX Guidelines distributed to VP's, Colleges Deans & SALX Coordinators
March 1 - April 10	Submission period for Equity & Special Increase Requests
March 21	Deadline: New Hires set up and fully approved in HR
March 23	Office of Budgets: Create Salary Raise Exercise file
March 27-29	SALX Training
March 27 - April 9	SALX Eligibility Process
April 9	Deadline: Signed Eligibility Reports to the Office of Budgets
April 10	Deadline: Submit Equity & Special Increase Request forms

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Timeline

Date	Description
April 13	Deadline: Special Increase Requests resulting from a: <ul style="list-style-type: none"> Change in job duties Major increase in responsibilities Promotion beyond the official Promotion & Tenure
April 30	College/Units notified by Provost or VP of which requests for Equity and Special Increases have been approved
Early May	Promotion & Tenure Approved – Office of Budgets will enter increases & title changes into SALX
May 7	Salary Raise Control Numbers released to VPs / Colleges
May 8 - 18	SALX Process: Input increases into system

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Timeline

Date	Description
May 18	Deadline: Complete SALX Process <ol style="list-style-type: none"> 1. Notify the Office of Budgets when complete 2. Print final raise reports and get signature approval of Department Heads, Deans, and VPs. 3. Return signed reports to the Office of Budgets
May 19 - 30	Provost/Office of Budgets will review SALX activity and balance to control totals
May 31	President's Operations Committee will review SALX results
June 1 - 6	Notification letters distributed to individuals informing them of recommended salary increase.
June 7 - 8	Salaries for FY19 will be loaded into HR
June 11 - 12	Office of Budgets will load FY19 salaries into Budget Construction

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Demonstrations

- **Accessing SALX**
 - Read vs. Update
 - Multiple users in one area
 - Coordinate responsibility by department
 - Only one person in a record at a time
- **Production Environment**, meaning we are using *LIVE* data. **Be careful when testing**

Accessing SALX

1. Open the AAR Home Page
2. Select HR System from the Application Systems menu
3. Login with you eID and Password
4. Click the CSU SALX folder
5. Click the SALX Employee Data link to open Oracle
6. Check the "I accept the risk and want to run this application" box and click run
7. Stop at the CSU Employee Data screen

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CSU Employee Data Screen

Blocked Fields are Grey

Entry Fields Yellow and White

Hot Keys

KEY : F11 = Enter Query
Ctrl + F11 = Execute Query
F4 = Exit/Cancel

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Poll: What fields on the SALX Employee Data Screen can you run queries on?

Query Mode

You can run queries on any of the entry fields.
White background, highlighted in yellow.

KEY : F11 = Enter Query
Ctrl + F11 = Execute Query
F4 = Exit/Cancel

Query by Department Number

1. Press F11 to enter query mode
2. Press Tab twice or click the Salary Authority Dept field
3. Enter your 4-digit department number (####)
4. Press Ctrl + F11 to run the query
5. Use the arrow keys to move between records, press F4 to exit

Excluding Employees

1. Run a query and select a record
2. Click the Exclude check box
3. Select the Comments section and type: Leaving CSU 6/30/16
4. Press F4 to exit, Do **NOT** save record. **Only during training.**

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Demonstration: Zero Increase Flag

- Provide appropriate code for Zero Increase Flag
 - **A** = Future pay increase later than July 1 due to existing contract
 - **B** = Performance issues
 - **C** = Resignation, termination, new hire, change in duties/title, or no raise for reasons other than performance (*most frequently used*)
- Do not forget to provide supporting explanation for each employee in Comments field (INCLUDE DATES)

Zero Increase in Salary

1. Run a query and select a record
2. Click the Zero Increase in Salary? field, and click the *** button
3. Select C No Salary Increase due to Prior Action
4. Select the Comments field and type: Retiring 12/31/17.
5. Press F4 to exit, remember do **NOT** save the record. **Only during training.**

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Reports

- **Employee Eligibility Report** (HRMSR311)
 - Due April 9
- **Salary Increase Entry Form Report** (HRMSR312)
 - Available to print and distribute starting May 8
- **Employee Salary Increase Report** (HRMSR310) due May 18
- **Salary Increase Summary Report** (HRMSR314) due May 18
 - Provide reports for each department as well as a report for the unit as a whole.
- **Salary Increase Comment Report** (HRMSR313) due May 18
 - **Reminder:** Equity & Special comments will flow-through automatically from the Justification section of the Equity & Special Increase form.

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Reports

- **Employee Salary Increase Report** (HRMSR310)
 - Confirm anyone receiving an equity and/or special increase is receiving at least the university average % increase
 - Obtain signatures of Department Head/Director and Dean/Vice President



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Reports


- **Salary Increase Summary Report** (HRMSR314)
 - Confirm salary control numbers are not exceeded
 - Confirm that special increases agree with the numbers approved by the Provost/President
 - Rerun reports as necessary until balanced with or under the salary control numbers
 - Obtain Dean/VP approval and signatures

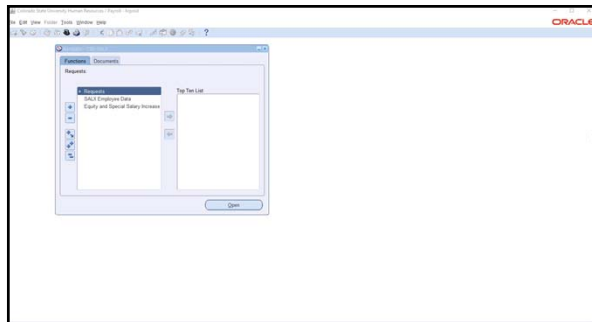
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Reports

Poll: When is a comment needed for an employee?

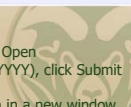
- **Salary Increase Comment Report (HRMSR313)**
 - Provide adequate comments to explain situations which will assist in the review process
 - Increase Range \geq 10%
 - Concurrent Assignments
 - New UDP & UDTs - Populate merit field & explain
 - Zero Increases (A, B or C)
 - Appointment changes





Running Reports

1. Double-click to expand +Requests, double-click Run
2. Use the *** button, select Employee Eligibility Report, click Open
3. Enter the Dept Nbr (#####) or Unit Code (XX) and year (YYYY), click Submit
4. Under +Requests, double-click View
5. Select the request, click View Output. The report will open in a new window.



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Coordinator Responsibilities

Communicate



Monitor

Review

Checklist: Found on the Office of Budgets webpage. Read and keep handy. Reference often during different stages of the SALX process.



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Submitting Reports

Poll: Where do you hand deliver all of your final signed reports?

- All areas **deliver** their signed reports to the Office of Budgets




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SALX Hours

This could be you if you wait until the last minute to complete the process and there is maintenance occurring on the system.



Be aware that there may be system updates or maintenance occurring on weeknights as well as weekends.




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Questions?

- For further questions, please contact:**
 - SALX Budget Office Helpdesk listserv
salx_budget_office_helpdesk@colostate.edu

Poll: Any suggestions to further improve the annual SALX process from your perspective?





Thanks for attending!



• **Evaluation Forms**

- We would like your feedback!
- You can complete them now, or mail them to:
Office of Budgets
1080 Campus Delivery