FY16 SALX Checklist

Post-Training Procedure For All SALX Coordinators
Complete the following steps immediately after training from your workstation.

- Logon to SALX and query some records
- Test ability to print reports
- Email the VPF Budget Office SALX Helpdesk
  (vpf_budget_office_salx_helpdesk@Mail.Colostate.edu) if you encounter problems

Set internal deadline dates earlier than the dates listed below so no deadlines are missed.

Verification of Eligibility Process  March 31-April 10
1. Verify that you have access to all appropriate departments
2. Print Employee Eligibility Reports (HRMSR311)
3. Identify and verify who should be considered for a salary increase. Distribute Employee Eligibility Reports to each department to review, make necessary corrections, and obtain signatures. Things to look for are listed in points a & b below. **In most situations, you will want to exclude someone who is leaving, retiring, had a recent out of cycle increase, is a contract employee, new hire and hasn’t been here long enough to be evaluated and given a raise, had a recent job change and already received an increase, etc.**
   a. Verify and/or correct budget department (called salary authority dept. in HR) numbers for each employee. This is the department an employee reports to, not their assignment or funding department.
      i. SALX Coordinators will need to make sure above information is input and corrected in SALX (budget department numbers). Also have corrections made in Oracle (salary authority dept.) so it is correct for next year. To find this in HR locate employee in Maintain Person screen, click Special Info button, and then scroll down and select Salary Authority Dept and populate missing or update existing information.
   b. Verify everyone that is to be considered for a salary increase is included (even though some may receive “no increase”)
      i. If someone is missing, contact Debbie Smith.
4. Collect the completed Employee Eligibility Reports that were distributed; be sure to verify they were signed by department representatives.
   a. The SALX coordinator should now enter any changes to SALX
      i. Correct the budget department numbers
      ii. Check the box named “**exclude field**” if employee is ineligible, and enter a brief explanation in Comments field as to why employee is being excluded.

<table>
<thead>
<tr>
<th>Examples:</th>
<th>Retiring 6/30/15</th>
<th>Terminating 5/15</th>
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<tbody>
<tr>
<td></td>
<td>Contract Ending</td>
<td>Resignation 5/30/15</td>
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5. Reprint Employee Eligibility Reports as necessary.
6. Review input and obtain signatures.
7. **Deliver approved reports to Budget Office by April 10**

Office of Budgets
Important Dates

- Equity & special increase requests forms due to Provost or Budget Office or by **April 13**
- The equity & special review process completed & units notified of outcome - **May 1**
- Raise percent and salary raise control numbers released - **May 11**
- Raise increase process begins - **May 12**

Set internal deadline dates earlier than the dates listed below so no deadlines are missed.

**Begin Entering New Year Salary Components  May 12-22**

1. Print Salary Increase Entry Form Report (HRMSR312)
2. Distribute report to Deans/Dept. Heads or VP/Directors and have them complete each column as appropriate.
   a. **Merit** (performance based, most common option)
   b. **Special Increase** (additional increase beyond merit & equity pool - funded from internal reallocations)
   c. **Discipline/Individual Equity** (individual equity study outliers)
   d. **Promotions** (Results from Promotion & Tenure process - only Office of Budgets enters this information)
   e. For increases outside the norm, include supporting documentation in Comments field
      
      **Examples:**
      - Increase > 10% because...
        - Special increase for expanded duties and retention concern. Merit=2.5%; Special=14%. Overall increase of 16.5%. Increase from EG funds.
        - Promotion=$7,000 (10%); Merit=2% for a total increase of 12%. EG funded.
      
   f. Provide appropriate code for Zero Increase Flag if no increase planned
      i. **A** = Future pay increase later than July 1 due to existing contract
      ii. **B** = Performance issues
      iii. **C** = Resignation, termination, new hire, change in duties/title, or no raise for reasons other than performance

   **Note: Do not forget to provide required explanations in Comments field**

3. Collect the completed Salary Increase Entry Form Reports that were distributed and all the necessary information needed to populate the Comments fields.
   a. The SALX coordinator should input increases into SALX
      i. Enter dollar amount into the appropriate fields
      ii. Enter brief explanations in Comments field where required or applicable (VERY IMPORTANT!) Follow Guidelines. Summary information used for central review and approvals.

**Prepare Next Year’s Proposed Salaries for Final Review and Approval  Due by May 22**

1. Print Employee Salary Increase Report (HRMSR310)
   a. Make corrections and regenerate reports to submit for approval, as necessary
2. Print Salary Exercise Comment Report (HRMSR313)
   a. Make corrections and regenerate reports to submit for approval, as necessary

Office of Budgets
3. Print Salary Increase Summary Report (HRMSR314)
   a. Confirm salary control numbers are not exceeded
   b. Confirm that special and/or equity increases agree with the numbers listed by employee on approved control sheet. If modified, explain in Comments.
   c. If totals are less than or equal to control numbers, proceed to step 4. If totals exceed control numbers, modifications to input will be required.
      i. Make changes (may impact few or many records)
      ii. Rerun reports until balanced or under control numbers
4. Obtain Department/Dean or Director/VP approval and signatures

Set internal deadline dates earlier than the dates listed below so no deadlines are missed.

**SALX Process Final Steps**

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
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<tbody>
<tr>
<td>1.</td>
<td>Collect approved and signed reports from the Department/Dean or Director/VP</td>
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<tr>
<td></td>
<td>a. Employee Salary Increase Report (HRMSR310)</td>
</tr>
<tr>
<td></td>
<td>b. Salary Exercise Comment Report (HRMSR313)</td>
</tr>
<tr>
<td></td>
<td>c. Salary Increase Summary Report (HRMSR314)</td>
</tr>
<tr>
<td>2.</td>
<td>Submit reports for next level of review - Deadline: <strong>May 22</strong></td>
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<tr>
<td></td>
<td>a. Areas reporting to the Provost should deliver reports to Provost’s Office, Attention: Dr. Daniel Bush</td>
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<td></td>
<td>b. Areas reporting to the President should deliver reports to the Office of Budgets, Attention: Debbie Smith</td>
</tr>
<tr>
<td>3.</td>
<td>Central Offices will not be populating the comments for you – please be thorough in your work and read the Guidelines carefully to make sure you are in compliance.</td>
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<tr>
<td>4.</td>
<td>If problems identified, reports will be returned for corrections and a very short turnaround for them to be returned will be necessary.</td>
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