Steps to Follow in Salary Planner

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NOTE: Steps to Follow in Salary Planner is intended as a job aid for someone who has already used Salary Planner. Salary Planner has many options not used by Texas Tech and it is easy for the novice to make mistakes. For detailed reference, please see the Guide to the Features of Salary Planner, where unused options are clearly marked.

A. SIGN-IN TO SALARY PLANNER

1. On the A&F Work Tools Tab in RaiderLink, click the Budget Prep link (Budget Office Channel), and on the Budget Prep Menu click on Salary Planner Menu.

2. On Salary Planner Menu click on Edit Scenario.
3. On the Edit Scenario screen, choose the appropriate FY

The example below is for FY2012 where Extract ID = TTU FY2012, Scenario = T12SAL. Select Position Attributes as the Filter Criteria.

4. On the Position Filters screen, Click ALL if that is appropriate or make a selection for Organizations / Employee Class / Bargaining Unit / Faculty Rank; then
   * click [List by Employee] button to verify employee FOAPs, go to step B
   * click [Summary Totals] button to view employee and position totals, step 5.
5. Summary Totals

### Summary Totals

Select an Organization to display subordinate organizations.

<table>
<thead>
<tr>
<th>Organization</th>
<th>Position FTE</th>
<th>Base Budget</th>
<th>Total Change Percent</th>
<th>Total Change Amount</th>
<th>Proposed Budget</th>
<th>Proposed FTE</th>
<th>Base Salary</th>
<th>Total Change Percent</th>
<th>Total Change Amount</th>
<th>Proposed Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>B53020</td>
<td>1.5</td>
<td>126.00</td>
<td>.00</td>
<td>.00</td>
<td>126.00</td>
<td>1.0</td>
<td>121.21</td>
<td>.00</td>
<td>.00</td>
<td>121.21</td>
</tr>
<tr>
<td>Total</td>
<td>3.5</td>
<td>126.00</td>
<td>.00</td>
<td>.00</td>
<td>126.00</td>
<td>1.5</td>
<td>121.21</td>
<td>.00</td>
<td>.00</td>
<td>121.21</td>
</tr>
</tbody>
</table>

**List by Position:** Go to Section C, “Working with Positions”

**List by Employee:** Go to Section B, “Starting with Employees”

**Position Filter, item A.4**

**TTU FY2010 Extract - T10SAL**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Include Subordinate Organizations</th>
<th>Employee Classes</th>
<th>Bargaining Units</th>
<th>Faculty Rank</th>
<th>Include Pooled Positions</th>
<th>Include Vacant Positions</th>
</tr>
</thead>
<tbody>
<tr>
<td>B53020</td>
<td>Yes</td>
<td>All</td>
<td>All</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Release:** 7.0.9.1
B. PART 1 - STARTING WITH EMPLOYEES

6. On the List by Employee screen, click the R#, Name for Employee Details.

Do not make entries on this screen. Click employee ID and Name to make entries to the employee.
7. On the Employee Detail screen  
   * click the Distribution link to verify FOAPs, go to step 8  
   * click the Comments link to include notes, go to step 10

Use this screen as the worksheet for the employee.

If a Merit Pool is available, the Pay Plan Adjustment columns will be labeled for Merit Pool entry. Otherwise no entries should be made on this screen.
8. On the Job Labor Distribution screen, verify the proposed Amount is correct
   * If the Proposed Amount is correct, click the [Copy Job Distribution to Position] button.
   * If the Proposed Amount is not correct, then change the percent or add a new FOAP, step 9.

   ![Job Labor Distribution Diagram]

   - **FY10 for this employee**
   - **FY11 for this employee**
   - PERCENT: Edit/Remove this FOAP, item 9
   - Add a NEW FOAP, item 9
   - Add a new record
   - Always copy Job to Position after editing FOAPs or %’s.
9. On the Account Distribution screen, enter edit FOAPs and/or Percents. This screen is used to enter or remove FOAPs or edit Percents.

10. For the employee appointment, add Comments as needed. (Stored with Job record)
C. PART 2 - ENDING WITH POSITIONS

11. On the List by Position screen, update Pooled Positions and Vacant Positions
   * Edit Job Labor Distribution, step 12
   * Insert Comments, step 14
   * View Employees Appointed to the Position, step 15

List By Position

DISTRIBUTION: FOAP Add/Remove, item 12
COMMENTS: Regarding the position, 14
EMPLOYEE: View Employees appointed to this position, item 15

SAVE: Save your entries.
RESET: Clear entries since last SAVE.

The FOAP distribution is displayed for the position. This screen should only be used to view the FOAP distributions of the employees appointed to a pooled position.
13. Account Distribution for Position  Enter or edit FOAP for the position.

**Account Distribution**

Add or change an Account Distribution component and select Save. You may choose an Account Distribution component button to query values.

**Budget Distribution for Position T94008**

- COA: T
- Default from Index
- Index: 12082
- Fund: 553351
- Organization: 854491
- Account: 644001
- Program: 280
- Activity: 0
- Location: 0
- Project: 0
- Cost Type: 0
- Percent: 100.00
- Amount: 315.00

[Green arrows pointing to various buttons and fields with text annotations:
- Enter/Edit the FOAP, or edit the Percent
- SAVE the entries
- REMOVE the displayed FOAP
- Return to Position Distribution, item 12]

14. Position Comments

**Position Comments**

- Position and Title: T94008 Graduate Assistant
- Last Updated by: Lisa Gay Mills
- Last Updated on: May 04, 2009
- Comments:

[Empty comments field]

[Green arrows pointing to buttons:
- Save
- Reset]

[List By Position | Position Detail]
15. View Employees Appointed to the Position

The Proposed employee salaries are displayed for the position. The list is useful when reviewing pooled positions; it should not be used for entries because the employee entries were made during B. Part 1 – Starting with Employees.
E. OPERATIONAL PROCEDURES

E.1 Lock
The Lock closes all organizations below you to entry, but your level stays open for entry. Your first action before getting started is to lock the organizations below your level so that no more entries can be made. There is no email notification when your organization is locked. You and your chain of command must communicate. NOTE: Level 7, the lowest level of the organization, does not need to lock.

E.2 Pooled Positions
You will review Pooled Positions after verifying employee salaries and labor distributions. You may increase or decrease FTE on a pooled position to reflect your plans for the new fiscal year, as well as the respective position budget amounts.

E.3 Vacant Positions
You may edit salaries on vacant positions, but not FTE. A vacant position must have an active FOP. If the vacant position is a research position and the grant will be active on September 1, the FOAP may be a research FOP. However, if the grant will end before September 1, then the position must be assigned a FOAP that will be active on September 1.

E.4 Grants and Budgets NOT in the Operating Ledger Budget
Employees paid from grants and other FOPs not in the permanent fiscal year Operating Budget must be verified in Salary Planner; however, no budgeting is required in Budget Development for these FOPs.

E.5 Unallocated Salaries
All salaries for “overload” jobs (listed as “other jobs” in SP) cannot be updated in Salary Planner, but should always be budgeted in budget pool 6Z1 (contingency) of your FOAPs in Budget Development.
F. A QUICK REFERENCE TO SALARY PLANNER

A. Intro to Salary Planner

1 Budget Prep Menu
2 Salary Planner
3 Edit Scenario: Choosing the Scenario and Filter Criteria.
   By Position Attributes: DESIREABLE Use the “Position Filter”, step
   By Employee Name: LESS DESIREABLE Use the “Employee Filter” to search by Employee Name or R#
4 Position Filter: Choose organization(s), list employees by Employee Class Code(s), include or exclude vacant and/or pooled positions. See the results by
   List by Employee
   Summary Totals
   List by Position
   Employee: follow section B “Part 1 - Starting with Employees”
   Totals for the organization of both positions and employees: See item 5
   Position: follow section C “Part 2 - Ending with Positions”
5 View Summary Totals for Employees and for Positions

B. Part 1 - Starting with Employees

6 List by Employees
   From the list, click employee name
7 Employee Detail, click a link to:
   Employee Distribution
   9 Add/Remove FOAPs
   Upon return, copy FOAP to Position:
   Copy Employee Distribution to Position
10 Employee Comments, if desired.

C. Part 2 - Ending with Positions

11 List by Position
   Do not edit salaries on single positions.
   Review/update Vacant and Pooled Salaries per Operational Procedures, E.2 – E.3. Click links to:
12 Position Distribution
   Click link to Add/Remove FOAPs
13 Account Distribution
14 Position Comments
15 Employees (appointed to this position)