



## Salary Planner Information (FY12)

Academic & Open Range  
Civil Service Employees

July 2011

## Salary Planner Overview

- Salary Planner allows units to view and manipulate budgeted Academic & Open Range Civil Service employees individually or grouped together by Organization (Org).
- You may change salary, FTE, Labor Distribution (FOAPAL codes), and title (Faculty Promotion and Tenure) for Academic employees. Limit yourself to salary and FOAPAL changes for Open Range employees.
- Salary Planner allows you to view an Org's "Average Rate Increase" by taking the total rate increase for an Org divided by its "Total Base Salary." This information is required by the Provost Office after units are locked down.

## Section I

# Accessing Salary Planner

# Accessing Salary Planner

1. Go to <http://apps.uillinois.edu>
2. Click **Administrative Applications**.

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## Enterprise Applications

### WELCOME TO UI ENTERPRISE APPLICATIONS

**Student & Faculty Self-Service**  
**Student & Faculty Self-Service** (student registration, records, financial aid and accounts services; faculty teaching and advising services)

**Employee Self-Service**  
**Employee Self-Service** (access timesheets as well as your personal employment and benefits information, including MESSIE)

**Administrative Applications**  
**Administrative Applications** (access to UI-Integrate/Banner and related University business, HR, and Financial Applications)

**Systems Status** (find out whether systems are experiencing connectivity or other problems that affect response times)

**Help** (go here if you have problems accessing student/faculty, employee, or administrative applications)

For more information about Administrative Information Technology Services, go to [AITS, University of Illinois Enterprise Resource Planning](#). Send comments and inquiries to [AITS Service Desk](#). The University of Illinois is the state's leading educator with campuses at Chicago, Springfield, and Urbana-Champaign.

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# Accessing Salary Planner

3. Click **Human Resources**.
4. Click **Salary Planner**.

The screenshot shows the University of Illinois Enterprise Applications website. At the top, the University of Illinois logo is displayed with the text 'URBANA • CHAMPAIGN • CARRLEIGH • SPRINGFIELD' and a 'Home | Contact' link. Below the logo is a blue header bar with the text 'Enterprise Applications'. The main content area is titled 'HUMAN RESOURCES' and contains a list of links. The link 'Salary Planner: (An interface for completing Annual Salary Changes for Budgeted Employees)' is circled in red. To the left of the main content area, there is a sidebar with links for 'Student & Faculty Self-Service', 'Employee Self-Service', 'Administrative Applications', 'Systems Status', and 'Help'. At the bottom of the page, there is a small page number '5'.

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Enterprise Applications

**HUMAN RESOURCES**

- [Adjustment Notification Application](#) (used for initiating overpayment adjustments, current pay period time corrections, pay stops, leave balance updates for civil service employees, employee award payments and taxable benefit payments)
- [Banner Administrative Forms](#)
- [DASIS](#) (an interface for completing department-level Human Resources transactions)
- [Human Resources Front End](#) (an interface for performing select HR transactions using a routing and approval process before applying to Banner)
- [Personal Information Transmittal Request \(PITR\)](#) (an interface for requesting a PITR for an employee)
- [Protected Final Attachment Repository \(PFAR\)](#) (an interface for viewing/updating a PFAR)
- [Salary Planner: \(An interface for completing Annual Salary Changes for Budgeted Employees\)](#)
- [Workflow](#) (an interface for completing Payroll Adjustments and One-Time Payments)

Student & Faculty Self-Service  
Employee Self-Service  
Administrative Applications  
Systems Status  
Help

5

**NOTE:** The links you see on this page may differ, depending on your security access.



# Accessing Salary Planner

8. Click **Employee**.
9. Click **Salary Planner**.

The screenshot displays the UIC University of Illinois at Chicago website. At the top, the UIC logo and the text 'UNIVERSITY OF ILLINOIS AT CHICAGO' are visible, along with the tagline 'A World-Class Education, World-Class City'. Below this is a navigation bar with the word 'Employee' highlighted. A search bar with a 'Go' button and links for 'RETURN TO MENU', 'SITE MAP', and 'HELP EXIT' are present. The 'Employee Main Menu' section lists several options: 'Time Sheet', 'Benefits and Deductions', and 'Salary Planner'. The 'Salary Planner' link is circled in red. At the bottom right, there is a logo for 'powered by SUNGLAND HIGHER EDUCATION'.

# Salary Planner Main Menu

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

At World-Class Education, World-Class City

Employee

Search:

[RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

## Salary Planner

[Create Scenario](#)  
[Copy Scenario](#)  
[Edit Scenario](#)  
[Organization Lock](#)  
[Query Multiple Extracts](#)

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**NOTE:** The links you see on this page may differ, depending on your security access.

For example, the "Create Scenario" option is not available to Colleges or Units.

## Edit Scenario

- Most of your time in Salary Planner will be spent in the “**Edit Scenario**” function.
- There are two “views” of employee data:
  - By Position Attributes
  - By Employee Name

## Salary Planner

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Create Scenario

Copy Scenario

Edit Scenario

Organization Lock

Query Multiple Extracts


# “Edit Scenario”

Employee

Search

[RETURN TO MENU](#) | [SITE MAP](#) | [HELP](#) | [EXIT](#)

## Edit Scenario

 Choose Extract ID and Scenario, then select filter criteria.

### Scenario Selection

Extract ID:

Scenario:

### Filter Criteria

By Position Attributes:

By Employee Name:

Select the Extract ID then wait a beat for the Scenarios to populate.

[\[ Create Scenario \]](#) | [\[ Close Scenarios \]](#) | [\[ Organization Lock \]](#) | [\[ Query History Extracts \]](#)

RELEASE: 0.2

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## “Edit Scenario” Description

- “Extract ID” identifies the Salary Planner extract to view/work with
- For 2011, the extracts are:
  - 12 COA 2 AC
  - 12 COA 2 OR
  - 12 COA 2 UA
  - 12 COA 2 CS (view-only)
- “12” indicates fiscal year; “2” indicates UIC campus

### *Scenario Selection*

Extract ID: 12 COA 2 AC ▼

Scenario: PRACTICE ▼

## “Edit Scenario” Description

- The “Scenario” field will default to “FINAL”.
- “Filter Criteria” specifies which of the two views you wish to use.
  - “By Position Attributes” (next slide) allows you to select & view by Org.
  - “By Employee Name” (see slide 25) allows you to select and view by Name/UIN; wildcards (% sign) are permitted.

### *Filter Criteria*

By Position Attributes:

By Employee Name:

12

Scenarios:

- PRACTICE is a playground for training/practice for users
- FINAL is the real thing. Make the changes you want uploaded to Banner in the FINAL scenario



## “By Position Attributes” Description

- “**Organizations**” identifies which Org or Sub-org to view. This Org code is based on the employee’s Position Budget Org. The list is limited by your Salary Planner security. Multiple selections are allowable by using Ctrl+click or Shift+click.
- “**Employee Class**” (*Optional*) identifies which e-classes to filter by (AA-Acad 9/12 mth Ben Elig, for example).
- “**Faculty Rank**” (*Optional*) identifies which faculty ranks to filter by (based on PEAFACT information).
- Press “**List by Employee**” button when finished.
- **NOTE:** “Summary Totals” button will display totals by the Org(s) selected and does not contain individual job information.

“Records per Page” determines how many records will appear on the screen.

List by employee lists the search results by the names of your employees rather than list by position, where you will see a list of the positions without the employees’ names, especially since these are pooled positions.

# "List by Employee" Screen

Employee

Search

RETURN TO MENU SITE MAP HELP EXIT

## List By Employee

Enter a Mass Change or modify an employee, then select data including options to mass change as well as individual employee changes.

Mass Change

Frequency

Hours or Salary

Reason: Percent Amount Include in Change Total

All-Work Decrease (CT)    Yes

Other    No

Access the Board (CT)    Yes

[Jump to Bottom](#)

**DO NOT HIT THE  
ENTER KEY ON  
THIS SCREEN**

427899 Human Resources at OTO, Undocked

Employee Name	Position, HRF Code and FTE	Employee Totals		Department Totals									
		Base Salary	Proposed Salary	Base Salary	Proposed Salary	Change Percent	Change Amount	Proposed Salary	Contract Status	Excluded from Totals			
XXXXXXXXXX Sue, Lane	00007 - 40 US AGENT	1	70,000.00	1	70,000.00	0	0	0	0	0	70,000.00		Yes
<b>Total</b>				1	70,000.00	0	0	0	0	0	70,000.00		

Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
427899 - Human Resources at OTO	1	1	70,000.00	0	0	70,000.00
<b>Total</b>	1	1	70,000.00	0	0	70,000.00

427899 P-40 - PROACTOR

Organization	Exclude Employees	Employee	Class	Change	Salary	Unit	Proposed Salary	Exclude Amount	Exclude Proposed
427899 - Human Resources at OTO	0	0	0	0	0	0	0	0	0

Records: 1 - 1 of 1

## “List by Employee” Basic Info

- **DO NOT HIT ENTER on this screen!**
- Hitting ENTER will press the “**Mass Apply**” function, which will discard any data you have entered on the individual jobs.
- Use the TAB key on your keyboard to navigate from one field to the next or directly click in the field you want to go to next.
- Click SAVE often to be safe and save your changes.

# “List by Employee” Screen

**DO NOT HIT THE ENTER KEY ON THIS SCREEN**

Jump to Bottom

457000 Human Resources at UIC, Unpublished

ID and Name	Position, Title and Title	Employee Totals		Department Totals				Proposed Salary	Extract Status	Excluded from Totals	
		FTE	Salary	Base FTE	Proposed FTE	Base Salary	Change Percent				Change Amount
Employee Doe, Jane	CS&M72 - DE GRH H&M1	1	70,000.00	1	1	70,000.00	.00	.00	70,000.00	Changed	
<b>Total:</b>				1	1	70,000.00	.00	.00	70,000.00		

Totals

Organization	Base FTE	Proposed FTE	Base Salary	Change Percent	Change Amount	Proposed Salary
457000 - Human Resources at UIC	1	1	70,000.00	.00	.00	70,000.00
<b>Total:</b>	1	1	70,000.00	.00	.00	70,000.00

12 C04 Z AC - PRACTICE

Organization	Exclude Subordinate Organizations	Employee Classes	Exclude Vacancies	Exclude Faculty	Exclude Non-Faculty	Exclude Packed Positions	Exclude Vacant Positions
457000 - Human Resources at UIC	all	all	all	no	no	no	no

Records 1 - 1 of 1

Save | Reset

Download Job Data | Download Job and Distribution

Employee Totals | Department Totals | Enter Changes

Changed will only appear if the extracted job record is different from the current job record in Banner.

DO NOT HIT ENTER OR COULD LOSE CHANGES - Do not hit ENTER on this screen because it will activate the Mass Apply button and discard any of the changes you've made.

## “List by Employee” Basic Info

- Employees are listed alpha-order, grouped by six-digit Org code, with a total for each Org listed.
- Multiple jobs (in the same Org) for an employee are combined together in one row (click employee's name to see all jobs listed separately – see slide 26).
- FTE & Salary for the department is listed as “Base” and “Proposed” – typically you would not change “Base” information.
- You may assign a salary increase, either by **percent** or by dollar **amount**. Be careful when the person has multiple jobs in the same unit as Salary Planner will split the increase across the jobs in a manner you may not like!
- When making changes, follow the salary guidelines once they are distributed.

If your employees only have one job, this might be the screen where you do most of your changes. If your employee has multiple jobs, you have to be careful about entering increases on this screen because the increase will be applied across all the jobs in that org...you may want to use the Employee Detail screen.

Employee total salary and FTE are listed for reference purposes.

## “List by Employee” Basic Info

- You may click on the person’s name to take you to the “Employee Detail” screen to change the job’s FTE, FOAPAL, or to see all jobs listed separately (See slide 26).
- You may also click on the job’s Position Number to take you to the “Job Detail” screen (See slide 30). Salary Planner will show you what the job currently looks like in the HR Front End (Job Detail accordion).
  - Normally, Salary Planner’s “Base” job information and the HR Front End will match, unless you (or someone) submits a HR Front End transaction to change the job (FTE, Salary, etc).
  - When the “Base” Salary Planner information no longer matches what is “current” in the HR Front End, the “Extract Status” field will display the word “Changed”.

19

HR Front End = current information, not proposed changes. SP is looking at what is current in BANNER, which is also displayed in the HRFE

## “List by Employee” Basic Info

- After entering one or more salary increases, use the “Page Down” key or scroll down to the save button to save your changes. **SAVE OFTEN!**

Next 25 Records 1 - 25 of 67

Save Reset

- This is also the area where you can proceed from one screen to the next, using the “**Next**” and “**Previous**” buttons. If you’ve changed anything on the current screen, be sure you save first.

20

Next and previous allows you to go to the next or previous screen to see more employees. You can adjust the number of employees you see on a screen when you are on the Position Attributes Filter screen.

## “List by Employee” Mass Apply

### Mass Change

Rounding:

Hourly or Salary:

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase (CS)	<input type="text"/>	<input type="text"/>	Yes
Other	<input type="text"/>	<input type="text"/>	No
Across the Board (CS)	<input type="text"/>	<input type="text"/>	Yes

- One of the features of the “List by Employee” screen is the ability to apply a percent increase or a dollar amount (prorated by FTE) to everyone in the listed org.
- NOTE: You would not mass apply anything except for the “All-Merit Increase” category.

21

## “List by Employee” Mass Apply

### Mass Change

Rounding:

Hourly or Salary:

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase (CS)	<input type="text" value="2.50"/>	<input type="text"/>	Yes
Other	<input type="text"/>	<input type="text"/>	No
Across the Board (CS)	<input type="text"/>	<input type="text"/>	Yes

- You may round proposed salaries to the nearest dollar, 10 dollars, or 100 dollars using the “Rounding” drop-down box.
- After pressing the Mass Apply button, you can still mass apply a different salary increase or adjust a job to have a different increase.

22

## “List by Employee” – Downloading Data

- At the bottom of the “List by Employee” screen, there are 2 download buttons for downloading data into Microsoft Excel.



Download Job Data shows both the Banner current job detail and the proposed job detail information. It shows the change amount and change percent by job.

Download job and distribution shows the FOAPAL as well.

## “By Employee Name” Filter

### Employee Filter

---

Last Name:

First Name:

ID:

Number of Records per Page: 25

- The second way to look at Employees requires entering a Name or UIN.
- If you want a list of everyone that you have security authorization to make changes to, enter the wildcard % in the last name field.
- Click “Go”.

24

## “By Employee Name” Filter

- If you used a wildcard search, the “Search Results” screen will appear, showing everyone that matched your conditions (alpha sort).
- Right-click on a person’s name, then choose “Open in New Window”. This allows multiple people to be opened at the same time.
- If your search returned just one name, this screen will not display and “Employee Detail” will display instead.

### Search Results

Select an employee to access the Employee Detail Page.

Name	ID
Green, Andrew	021014948
Green, Brian	021264381
Green, Carl	067042247
Green, Daniel	024323024
Green, Eric	017420261
Green, George	098525141
Green, James	020120745
Green, Jeffrey	047008321
Green, Julie	033563135
Green, Matthew	011006989
Green, Nancy	047204101
Green, Patrick	037361029
Green, Paul	087971882
Green, Randy	033008183
Green, Richard	091006480
Green, Roberts	047734101
Green, Ryan	082981511
Green, Sandra	087404076
Green, Stephanie	060513155
Green, Taylor	017914891

Records 1 - 20 of 20

# “Employee Detail” Screen

Employee  
Name and ID: Jane Doe 831567402  
Home Organization: 407000 - Human Resources at UIC

Position Profile and Title	Organization	Basic Rate	Organized Rate	Base Salary	All-Work Increase (%) Percent	All-Work Increase (CA) Amount	Other Percent	Other Amount	Proposed Salary	Links	Exclude from Totals
004073 - 00 DIR MGMT	407000 - Human Resources at UIC	0	1	70,000.00	.00	.00	.00	.00	70,000.00	Job Detail Distribution Comments Position Detail	<input type="checkbox"/>
Total:		0	1	70,000.00	.00	.00	.00	.00	70,000.00		

Organization	Basic Rate	Organized Rate	Base Salary	Change Percent	Change Amount	Proposed Salary
407000 - Human Resources at UIC	0	1	70,000.00	.00	.00	70,000.00
Total:	0	1	70,000.00	.00	.00	70,000.00

Buttons: [Data] [Reset]

Job Base Data

Enter Changes

See More Details

Job Base Data = the base data that was extracted from Banner into salary planner.

Enter Changes = the area where you can make changes.

See More Details = links to more information about the particular job.

## “Employee Detail” Basic Info

- Each job a person has appears on this screen (even jobs in other Orgs or non-budgeted but active jobs).
- Jobs in other Orgs are view-only if you do not have security authorizations to the other Org(s).
- You may assign individual salary increases to the “All-Merit Increase” fields as a percent or dollar amount.
- When finished entering data, click the Save button at the bottom of the screen. **Do not** hit the Enter key.

27

Salary Planner calculates the merit increase on the **base salary**, not the proposed salary even if there is an FTE change. It calculates solely on the base salary.

For example, if you have a .5 job with a base salary of \$50,000, and you increase the FTE to 1.0, the proposed salary increases to \$100,000 due to the FTE change. But any merit increase will be calculated on the \$50,000 salary. So a percent increase of 10% would show as \$5,000 instead of \$10,000.

## “Employee Detail” Basic Info

- There are links on this screen to take you to “Job Detail” (see slide 30), Job Labor “Distribution” (see slide 37), and Job “Comments” (see slide 41).
- If you opened this screen in a separate window, you may close this window when finished. Otherwise, use the “List by Employee” link at the bottom of the screen to return to the “List by Employees” screen.
- There may be “Next” and “Previous” buttons at the bottom of the window (depending on how you opened it) which allows you to navigate from one employee to another.

28

## Section 2

# Job Details and Changes

# “Job Detail” Screen

Job Detail for Position and Suffix C67643 - 00

Model:	Proposed	Base	Current
Effective Date:	Aug 16, 2011	Jul 01, 2011	Jul 01, 2011
Title:	DIR MGMT	DIR MGMT	DIR MGMT
Hourly Rate: ✓	33.654493	33.654493	33.654493
Annual Salary: ✓	70,000.00	70,000.00	70,000.00
Total Change Percent:	.00		
Total Change Amount:	.00		
Appointment Percent: ✓	100.00	100.00	100.00
FTE: ✓	1	1	1
Hours per Day: ✓	8.00	8.00	8.00
Hours per Pay: ✓	173.33	173.33	173.33
Salary Group:	2011	2010	2010
Table: ✓	AA	AA	AA
Grade: ✓	UNDFD	UNDFD	UNDFD
Step: ✓	0	0	0
Budget Factor: ✓	100.00		
Estimated Fiscal Year Budget: ✓	70,000.00		
Exclude from Totals:	<input type="checkbox"/>		

What you want to be effective on 8/16

Change Title for Faculty Promotion and Tenure Here

Data that was Extracted

Comes from HRFE

- This screen shows what's current in the HR Front End (Job Detail accordion), in order to compare Salary Planner info with HR Front End info.

30

Current HRFE = actually pulling from Banner, but view in the HR Front End

## “Job Detail” Basic Info

- The job detail screen allows you to change a job's title.
  - Typically you would change a job's title for Faculty Promotions (Asst Prof to Assoc Prof, etc).
  - If the person is leaving one job to take another, a HR Front End transaction should be forwarded ending the first job and starting the person on a new job.
  - Be sure to save (at the bottom of the screen) after changing the job's title or any base job information.
- You may change “Proposed FTE” up or down for academics only.
  - Be sure to move the corresponding changes to salary in the “Other Amount” column.
  - For example, if a 50% job at \$25,000 is being increased to 100%, change “Proposed FTE” to 1.0 and place \$25,000 in “Other Amount”. You may then apply the person's salary increase in one of the “All-Merit Increase” fields.

31

When there is a difference between proposed and current, you get the CHANGED indicator.

# FTE Changes

Mass Change

Rounding: None

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase (CS)	25.00	14494.20	Yes
Other			No
Across the Board (CS)			Yes

Apply

✓ - indicates a required field.

Job Detail for Position and Suffix C45687 - 00

Model:	Proposed		
Effective Date:	Jun 30, 2010	Aug 1	
Title:	CLIN ASST PROF	CLIN ASST PROF	CLIN ASST PROF
Hourly Rate: ✓	43.554378	34.843502	34.843502
Annual Salary: ✓	72471.00	57,976.80	57,976.80
Total Change Percent:	.00		
Total Change Amount:	.00		
Appointment Percent: ✓	100.00	100.00	100.00
FTE: ✓	1	.8	.8
Hours per Day: ✓	6.40	6.40	6.40
Hours per Pay: ✓	138.66	138.66	138.66
Salary Group:	2011	2010	2010

1. Tab to the **FTE** field in the **PROPOSED** column.
2. Enter the new FTE.
3. Observe the amount that is populated in the **All-Merit Increase** field.

# FTE Changes

Mass Change  
Reading: None

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase (CS)			Yes
Other	25.00	14494.20	Yes
Across the Board (CS)			Yes

Apply

✓ - indicates a required field.

*Job Detail for Position and Suffix 045687 - 00*

Model:	Proposed		
Effective Date:	Jun 30, 2010	Aug	
Title:	CLIN ASST PROF	CLIN AS	
Hourly Rate: ✓	34.842497		
Annual Salary: ✓	72471.00		
Total Change Percent:	0.00		
Total Change Amount:	0.00		
Appointment Percent: ✓	100.00	100.00	100.00
FTE: ✓	1	.8	.8
Hours per Day: ✓	8.00	6.40	6.40
Hours per Pay: ✓	173.33	138.66	138.66
Salary Group:	2011	2010	2010

4. Move the amounts from the All-Merit Increase fields to the Other fields.

5. Delete (actually use the delete key) the amounts in the All-Merit Increase fields.

6. Tab to the Hours per Day field in the PROPOSED column.

Other = FTE Changes

All Merit Increase = any additional money above the FTE change

DO NOT USE “ACROSS THE BOARD” = locks Salary Planner for everyone and no other changes are allowed

# FTE Changes

Mass Change  
Reordering: None

Reason	Percent	Amount	Include in Change Totals
All-Ment Increase (CS)			Yes
Other	25.00	14494.20	No
Across the Board (CS)			Yes

Apply

✓ - indicates a required field.

Job Detail for Position and Suffix *CAS687 - 00*

Model:	Proposed
Effective Date:	Jun 30, 2010
Title:	CLIN ASST PROF
Hourly Rate: ✓	34.842497
Annual Salary: ✓	72471.00
Total Change Percent:	0.00
Total Change Amount:	0.00
Appointment Percent: ✓	100.00
FTE: ✓	1
Hours per Day: ✓	8.00
Hours per Pay: ✓	173.33
Salary Group:	2011

- Use the following formula to determine new hours per day:
  - Proposed FTE \* 8.0 hours = Proposed Hours per Day
  - For this example, it is 1.0 FTE \* 8.0 hours = 8.0 for the new Proposed Hours per Day
- Type in the Proposed **Hours Per Day**.
- Tab to the **Hours per Pay** field and use the following formula to determine new hours per pay:
  - Proposed FTE \* 173.33 hours = Proposed Hours per Pay
  - For this example, it is 1.0 FTE \* 173.33 hours = 173.33 for the new Proposed Hours per Pay

## Hours Per Day

- Proposed FTE \* 8.0 hours = Proposed Hours per Day
- Example: 1 FTE \* 8.0 hours = 8.0 for the new Hours per Day

## Hours Per Pay

- Proposed FTE \* 173.33 hours = Proposed Hours per Pay
- Example: 1 FTE \* 173.33 = 173.33 for the new Hours per Pay
- VERY IMPORTANT to update Hours Per Pay

# FTE Changes

**Mass Change**

Rounding: None

Reason	Percent	Amount	Include in Change Totals
All-Merit Increase (CS)	2.50	1449.42	Yes
Other	25.00	14494.20	No
Across the Board (CS)			Yes

- 10. Apply salary increase in **All-Merit Increase** field
- 11. Hit Save at bottom of screen

Apply

✓ - indicates a required field.

**Job Detail for Position and Suffix: C45687 - 00**

Modal:	Proposed	Base	Current
Effective Date:	Jun 30, 2010	Aug 16, 2009	Jun 16, 2010
Title:	CLIN ASST PROF	CLIN ASST PROF	CLIN ASST PROF
Hourly Rate: ✓	35.539347	34.843502	34.843502
Annual Salary: ✓	73920.42	57,976.80	57,976.80
Total Change Percent:	2.50		
Total Change Amount:	1449.42		
Appointment Percent: ✓	100.00	100.00	100.00
FTE: ✓	1	.8	.8
Hours per Day: ✓	8.00	6.40	6.40
Hours per Pay: ✓	173.33	138.66	138.66
Salary Group:	2011	2010	2010

## Section 3

# Labor Distribution Changes

# “Job Labor Distribution” Screen

## Job Labor Distribution

Select the percent link to change the Proposed Job Labor Distribution. Select Add a new record to add distribution records.

### Distribution

Name and ID: Jane Doe 631587463  
 Position-Title and Title: CR7643 - 00 558 93HT  
 EPMF Transaction #:

### Current

COA Index/Feed	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount	Excess/Amount	Override	End Date
2	10001	1407000	211300	407001					100.00	70,000.00			
Total										100.00	70,000.00		

### Proposed

COA Index/Feed	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount	Excess/Amount	Override	End Date
2	10001	1407000	211300	407001					100.00	70,000.00			
Total										100.00	70,000.00		

Add a new record

### Proposed Position Distribution

COA Index/Feed	Organization	Account	Program	Activity	Location	Project	Type	Cost Type	Percent	Amount	Excess/Amount	Override	End Date
2	10001	1407000	211300	407001					100.00	70,000.00			
Total										100.00	70,000.00		

Copy Position Distribution to Job | Copy Job Distribution to Position

To Change a Current FOAPAL

To Add a New FOAPAL

**NOTE: Do not enter 0% FOAPALS; they will prevent the record from uploading.**

## “Job Labor Distribution” Info

- This screen shows Job Labor Distribution(s) active in the HR Front End as of the time of the extract, which may or may NOT match the proposed Job Labor distribution. The proposed job labor distribution (academics only) in Salary Planner defaults from the Position Labor Distribution screen in the HR Front End (Position Data accordion).
- To edit a FOAPAL or remove a FOAPAL completely, click on the Proposed Percent field of the FOAPAL you wish to change and see the next slide.
- To add a FOAPAL, click the “Add a new record” link and see the next slide.
- Once you change/add the Job FOAPAL(s), you can copy the FOAPAL(s) to the position by clicking on the “Copy Job Distribution to Position” button.

38

What will be proposed to be effective on 8/16 in terms of funding will come from the position labor distribution for the ACs. If you do not want what is on the position, you'll need to either change the position labor distribution in advance of the extract or in salary planner after the extract.

## Adding/Changing FOAPALs

- To add a FOAPAL, enter each of the FOAPAL segments, along with the "Percent" of funding (note: the "Amount" field is view-only).
- To change an existing FOAPAL, just change the existing segment data and click "Save".
- To delete a FOAPAL, click "Remove".

CO#:	2	<input type="button" value="Default View Order"/>
<input type="button" value="Index"/>		
<input type="button" value="Fund"/>	000011	
<input type="button" value="Organization"/>	040000	
<input type="button" value="Account"/>	211400	
<input type="button" value="Project"/>	240011	
<input type="button" value="Activity"/>		
<input type="button" value="Location"/>		
<input type="button" value="Project"/>		
<input type="button" value="Cost Type"/>		
Percent:	100.00	
Amount:	\$7,276.30	
Expenditure Override End Date: MM/DD/YYYY		
<input type="button" value="Save"/>	<input type="button" value="Remove"/>	

- **All job FOAPALs must total 100% when multiple FOAPALs are present.**

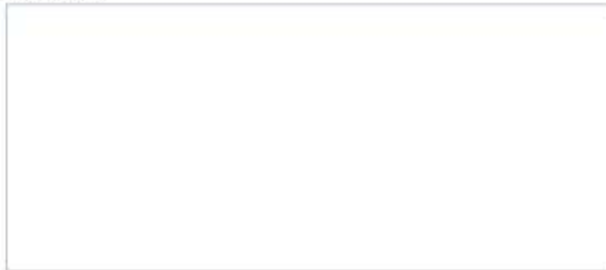
## Section 4

### Job Comments

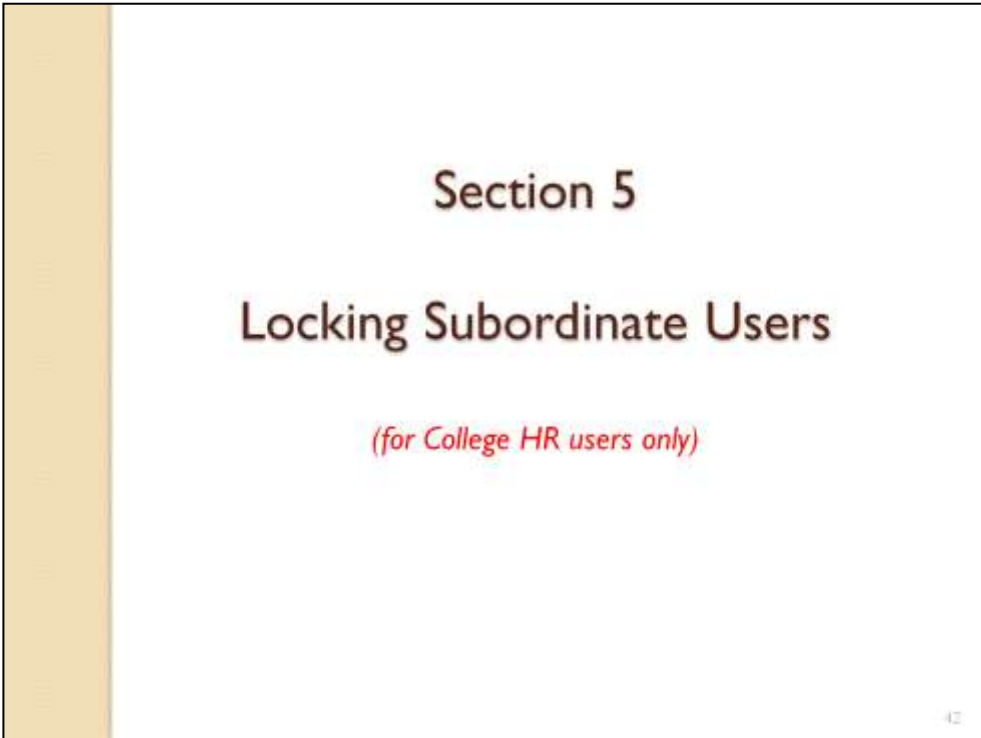
# “Job Comments” Screen

## Job Comments

Name and ID: Jane Doe - 631597463  
Position-Suffix and Title: C64673 - 00 DIR MGMT  
Last Updated by: Kenneth Scott  
Last Updated on: Jun 22, 2010  
Comments:



- Job Comments are **VERY important** when making changes in Salary Planner beyond simple Salary Increases. These comments are uploaded to Banner during the upload process.



Section 5

Locking Subordinate Users

*(for College HR users only)*

-42-

FOR COLLEGE HR USERS ONLY

## Locking Subordinate Users

- Access to Salary Planner is to specific organization codes.
- Users with access to organization codes that are higher in the organizational structure can lock subordinate users from making changes.
- This may be appropriate when a college or department sets deadlines for lower level organizations.

-43-

FOR COLLEGE HR USERS ONLY

# Locking Subordinate Users

**UIC** UNIVERSITY OF ILLINOIS  
AT CHICAGO

*A World-Class Education, World-Class City*

Employee

Search:

Salary Planner

Create Scenario  
Copy Scenario  
Edit Scenario  
**Organization Lock**  
Query Multiple Extracts

1. Select  
Organization  
Lock.

SP HELP EXIT

powered by  
**MINIARD** HIGHER EDUCATION

# Locking Subordinate Users

Employee

Search  Go

## Organization Lock Selection

Select an Extract ID and Scenario. Select the Lock Status All to display organizations regardless of status or choose a status. Lock level organization you have authority to change or designate a starting Organization.

Extract ID:

Scenario:

Lock Status:

Organization:

Submit

2. Select the **Extract ID**.
3. Select the **FINAL Scenario**.
4. Select **All** for Lock Status.
5. Leave **Organization Blank**.
6. Click **Submit**.

[ Create Scenario | Copy Scenario | Edit Scenario | Query Multiple Extracts ]

# Locking Subordinate Users

## Change Organization Lock

### Parameters

Extract ID: 10 COA 2 AC  
Scenario: FINAL  
Lock Status: All  
Organization: 2 - Chicago Campus  
Drill From Organization: 2 - Chicago Campus

### Organization Lock Status

Organization Title	Lock Status	Change
A1 Chancellor	Locked	<input checked="" type="checkbox"/>
A2 VC for External Affairs	Locked	<input checked="" type="checkbox"/>
B1 Provost & VC Acad Affrs - Acad	Locked	<input checked="" type="checkbox"/>
B2 Provost & VC Acad Affrs	Locked	<input checked="" type="checkbox"/>
B3 Provost & VC Acad Affrs - COM	Locked	<input checked="" type="checkbox"/>
C1 Vice Chanc Administrative Svcs	Locked	<input type="checkbox"/>
D1 Healthcare System, UIC	Locked	<input type="checkbox"/>
E1 VC for Research	Locked	<input type="checkbox"/>
F1 Vice Chancellor for Student Affrs	Locked	<input type="checkbox"/>
G1 VC for Human Resources at UIC	Locked	<input type="checkbox"/>
Y1 UA - Facilities Planning & Programs	Locked	<input type="checkbox"/>
Z1 Chicago General Use Rollup	Locked	<input type="checkbox"/>
Z2 Control - Organizations	Locked	<input type="checkbox"/>

Review Update

7. Click on the **Organization** code to drill deeper into the organizational hierarchy.

OR

8. Select the **Change** checkbox to lock or unlock the organization code(s).

9. Click **Update** to change the lock status.

[Choose Organization Lock](#)

# Locking Subordinate Users

## Change Organization Lock

Lock changes submitted have been applied.

### Parameters

Extract ID: 10 COA 2 AC  
Scenario: FINAL  
Lock Status: All  
Organization:  
Drill From Organization: 2 - Chicago Campus

### Organization Lock Status

Organization Title	Lock Status	Change
A1 Chancellor	Unlocked	<input type="checkbox"/>
A2 VC for External Affairs	Unlocked	<input type="checkbox"/>
B1 Provost & VC Acad Affrs - Acad	Unlocked	<input type="checkbox"/>
B2 Provost & VC Acad Affairs	Unlocked	<input type="checkbox"/>
B3 Provost & VC Acad Affrs - COM	Unlocked	<input type="checkbox"/>
C1 Vice Chanc Administrative Svcs	Locked	<input type="checkbox"/>
D1 Healthcare System, UIC	Locked	<input type="checkbox"/>
E1 VC for Research	Locked	<input type="checkbox"/>
F1 Vice Chancellor for Student Affrs	Locked	<input type="checkbox"/>
G1 VC for Human Resources at UIC	Locked	<input type="checkbox"/>
Y1 UA - Facilities Planning & Programs	Locked	<input type="checkbox"/>
Z1 Chicago General Use Rollup	Locked	<input type="checkbox"/>
Z2 Control - Organizations	Locked	<input type="checkbox"/>

10. Notice that the **Lock Status** has changed for the organizations selected in the previous screen.

11. In this example, users with access to organizations A1 – B3 can edit the extract. Users with access below A1 – B3 could not edit. Users with access below C1 – Z2 access also cannot edit because the "Lock Status" is locked..

[Choose Organization Lock](#)

47

## Section 6

### Miscellaneous Tips and Information

## Adding People/Jobs to Salary Planner

- Salary Planner does not permit adding or deleting of employees or jobs directly. Instead, we use the “Add/Delete” process to add jobs and to remove jobs.
- If a job isn't budgeted correctly in the HR Front End “Budget Profile” field, updating the field will result in the job being added to or deleted from Salary Planner during the next add/delete cycle.
- **The add/delete process does not update changes to FOAPALs, if the FOAPAL was changed after the original extract date.**

49

You will need to keep track of any FOAPAL changes that you make after the extract of the final scenarios in early July and make sure that, if these are still to be effective in August, that you change them in salary planner.

## HR Transactions

- Changes to appointments that are effective prior to 8/16/11 for academics and 8/21/11 for open range civil service will require a HR Front End transaction since Salary Planner can only apply changes effective 8/16 for academics and 8/21 for open range civil service.
- If a change to the job detail information is made in Banner after the extract, but before the upload, those changes should be updated in the base column of the job detail screen by the department.
- Job changes effective after 8/16 for academics and 8/21 for open range civil service cannot be entered until after Salary Planner upload occurs.

30

Anything that is effective prior to 8/16 should be handled via normal operating procedures. If something is entered into the job detail screen in Banner after the extract which is effective prior to the upload (determined by job detail effective date), then the department should update the base column in the job detail screen in salary planner.

## Links

- UICHR Salary Planner webpage:  
<http://www.uic.edu/depts/hr/quicklinks/salaryplanner/index.shtml/>
- UA Salary Planner Reports & Job Aids:  
[https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item\\_id=2474](https://hrnet.uihr.uillinois.edu/dart-cf/index.cfm?Item_id=2474)
- University HR Reports (under Salary Planner heading):  
<https://hr.uillinois.edu/HRSystems/ReportingPortal/HRReports/UHR.cfm>

## UICHR Contact

- UICHR Help Desk – General Salary Planner Questions
  - Phone 413-4848
  - Email: [uicrhelppdesk@uillinois.edu](mailto:uicrhelppdesk@uillinois.edu)

## Faculty Affairs HR Contact

For questions regarding Faculty:

- Faculty Affairs HR
  - Phone 355-2412
  - Email: [facultyasp@uic.edu](mailto:facultyasp@uic.edu)

## HR Service Center Contact

For questions regarding Academic Professionals or Civil Service:

- HR Service Center
  - Phone: 413-3490
  - Email: [uicrahrr@uillinois.edu](mailto:uicrahrr@uillinois.edu)

## Medical Center HR Contact

For questions regarding Medical Center processing:

•Teri Blain

-Phone: 413-1476

-Email: [terilynblain@uillinois.edu](mailto:terilynblain@uillinois.edu)

-Fax: 996-8081