

LINK BUDGET PLANNER

SALARY PLANNER



SP-104 Apply Annual Increases In Salary Planner – 12 Month Faculty

Date Issued/Rev: 4/7/2010

General Description: This procedure explains how departments/end users will access and apply annual increases to 12 Month Faculty jobs and positions in Salary Planner using LoboWeb.

Responsible Departments: Office of Planning, Budget & Analysis, School of Medicine Academic Affairs, and Main Campus Faculty Contracts & Services Office

IMPORTANT INFORMATION: A salary planner role [Department Salary Planner] with appropriate security is required before beginning this procedure. If this role has not been requested and approved, go to my.unm.edu and link on [Banner Authorization Requests](#) and apply for the appropriate role.

Update the 12 Month Faculty Scenario

Process Steps:

- Open a web browser and access my.unm.edu
- Log in with your Net ID and Password.
- Click on the “Employee Life” tab
- Click on the “LoboWeb” icon
- Click on the Finance tab at the top.
- Click [Budget Planner Menu](#)
- Click [Salary Planner Menu](#)
- Click [Edit Scenario](#)

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Edit Scenario

 Choose Extract ID and Scenario, then select filter criteria.

Scenario Selection

Extract ID: 12FAC11
Scenario: 12 MO FACULTY 11

Filter Criteria

By Position Attributes:
By Employee Name:

- **Extract ID:** Click drop down arrow and select 12FAC11
- **Scenario:** 12 MO FACULTY11
- **Filter Criteria:** By Position Attributes
- Click “Select”

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Search Go

Position Filters

Enter filter criteria and select desired button. Use Ctrl or Shift key to select multiple.

12FAC11, 12 MO FACULTY 11

- 1) Organizations: All
013A - Continuing Medical Educ Department
013B - Continuing Med Educ Gen Admin
- 2) Include Subordinate Organizations:
- 3) Employee Class: All
FE - Executive Faculty
FY - 12 Month Faculty
- 4) Bargaining Unit: All
None
- 5) Faculty Rank: All
None
- 6) Include Pooled Positions:
- 7) Include Vacant Positions:
- 8) Number of Records per Page: 100
- 9)

The "Position Filters" screen displays showing the Extract ID and Scenario selected in the previous steps. Verify that this is the correct selection before proceeding.

1) Organizations: Click on the down arrow to select the organization code(s) to be edited during the current session or select ALL.

2) Include Subordinate Organizations: Check the box to display subordinate organizations or uncheck to display only the selected organization.

3) Employee Class: Click to select the employee class to be edited during the current session or select ALL.

4) Bargaining Unit: Click to select ALL or NONE. The default is ALL.

NOTE: There will be no bargaining unit employees listed in the 12FACXX scenario. Bargaining unit employees are in separate scenarios.

5) Faculty Rank: Click to select ALL or NONE. The default is ALL.

6) Include Pooled Positions: The default for the box is checked.

NOTE: There will be no pooled positions listed in the 12FACXX scenario. Pooled positions are in a separate scenario.

8) Number of Records per Page: Click the arrow to select 25, 50, or 100 records per page. 100 is the default.

7) Include Vacant Positions: Check the box.

Vacant positions should be accessed and budgeted through the LIST BY POSITION option. On the List by Position page, click on [Position & Title](#) to update.

NOTE: On the "List by Position" screen, vacant positions will appear with -0- in the "Estimated Fiscal Year Budget" column to the far right. This amount is based on the salary of the job that has been attached to this position number. Since there is no incumbent (vacant position), the amount will be -0-. There **will** be an amount in the "Proposed Budget" column. This is the position budget amount as set up by Position Control.


9) Click "List By Employee" to proceed

Apply a Mass Salary Increase

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List By Employee

 Enter a Mass Change or modify an employee, then select Save

Mass Change

1) Hourly or Salary:

Reason	Percent	Amount	Include in Cha
2) Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

3)

4) [Jump to Bottom](#)

1) Hourly or Salary: Leave at the default – Both.

NOTE: UNM does not use this field.

2) Percent: Enter the percent in whole numbers. Begin by applying the average increase that has been determined.

NOTE: If decimals are required, use the format 2.25, not .0225 to apply a 2 ¼ % increase.

3) Mass Apply: Click the MASS APPLY button to apply the increase to all employees/jobs in the selected scenario.

4) Scroll to the bottom or follow the link [Jump to Bottom](#) to see how many records were changed, i.e., 25 of 25 records changed. Click the button SAVE.

NOTE: All employee records for the selected organization code and scenario will be changed even if there are a limited number displayed.

Apply an Individual Increase

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Search

List By Employee

Enter a Mass Change or modify an employee, then select Save. Rounding appli

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

[Jump to Bottom](#)

567A – Department of Xology

ID and Name	Position, Suffix and Title	Employee Totals	
		Appointment Percent	Salary
124579595 Archuleta, James	FY1299-00 Associate Professor	100.00	99,415.00



Apply an increase to an individual employee that is to be different from the average increase by clicking on the [ID and name](#) link on the “List by Employee” page. This will take you to the “Employee Detail” page.

Click on the [ID and name](#) in blue to go to the “Employee Detail” page.

Student Financial Aid **Employee** Payment Finance

Search

Employee Detail

Enter a Mass Change and select Mass Apply, or modify an individual Job record. Select

Mass Change

Hourly or Salary: Both

Reason	Percent	Amount	Include in Change Totals
Annual Salary Increase	<input type="text"/>	<input type="text"/>	Yes

Employee

Name and ID: James Archuleta 124579595
 Home Organization: 574A – Department of Xology
 Last Review Rating: -

Changes to the individual must be input in the fields at the top of the Employee Detail page. Click the MASS APPLY button. Click the SAVE button at the bottom of the page.

NOTE: Even though the button says MASS APPLY it will only apply this increase to the one individual that is listed because this is the “Employee Detail” page.

Extracted Jobs

Position Suffix and Title	Organization	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Annual Salary Increase Percent	Annual Salary Amount
FY1299-00 Associate Professor	574A – Department of Xology	100.00	100.00	99,415	.00	.00



DO NOT attempt to make changes in the body under the heading, “Extracted Jobs” these fields are not data enterable.

Modify a Position Budget

- On the Employee Detail page click on [List By Position](#) at the bottom of the screen to get to the List By Position page.

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Search Go

List By Position

Enter a Mass Change and select Mass Apply, or modify

Mass Change

Percent:

Amount:

Mass Apply

[Jump to Bottom](#)

567A – Department of Xology

Position and Title	Base Appointment Percent	Proposed Appointment Percent	Base F
FY1299-00 Associate Professor	100.00	100.00	

Click on the [Position and Title](#) in blue to go to the "Position Detail" page.

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Search Go

Position Detail

Mass Changes

Percent:

Amount:

Apply

* - indicates a required field.

Budget Detail for Position FY1299-00 Associate Professor

Model:	Proposed	Base	Current
Fiscal Year Budget:	101,403.00	99,415.00	99,415.00
FTE:*	<input type="text" value="1"/>	1	1
Appointment Percent:	100.00	100.00	100.00
Total Salaries:	101,403.30	99,415.00	
Estimated Fiscal Year Budget:	101,403.30		
Exclude from Totals:	<input type="checkbox"/>		

Apply a CHANGE AMOUNT to the Fiscal Year Budget field by using the fields at the top of the page under the heading "Mass Changes". This change will be applied to the PROPOSED fiscal year amount. It may be necessary to calculate the dollar change amount. Click the SAVE button at the bottom of the page.

Position

Organization: 574A – Department of Xology

Type: Single

Begin Date: Jul 01, 2007

End Date:

Status: Active

Save Reset Previous Next

NOTE: There will already be an amount and percent listed IF the MASS APPLY process was utilized. A positive or negative amount can be applied depending on need. This is adjusting the position budget (which is the amount to be fed to finance by index and account code).

NOTE for School of Medicine: This is the method to be used to estimate incentive pay by position, if applicable. Incentive pay would not be added to the contract salary job listed.

Change a Labor Distribution

- On the List by Employee page click on [ID and Name](#) for the individual whose distribution you want to change. This will take you to the Employee Detail page.
- On the Employee Detail page, click on [Distribution](#) located under “Links” on the far right. This will take you to the Job Labor Distribution page.

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Search Go

Job Labor Distribution

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

Name and ID: James Archuleta 124579595
 Position-Suffix and Title: FY1299-00 Associate Professor
 EPAF Transaction #:

Current

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount
U	567038	2U0224 567A	2000	P101	GNACTV					100.00	99,415.00
										Total	100.00 99,415.00

Proposed

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount	Del
U	567038	2U0224 023B	2000	P101	GNACTV					100.00	99,415.00	X
										Total	100.00 99,415.00	

Proposed Position Distribution

COA Index	Fund	Organization Account	Program	Activity	Location	Project	Type	Cost	Type	Percent	Amount
U	567038	2U0224 567A	2000	P101	GNACTV					100.00	99,415.00
										Total	100.00 99,415.00

[Employee Detail](#) | [Job Detail](#)
[List By Employee](#) | [List By Position](#) | [Summary Totals](#)

Click on the "x" to delete a record

Click here to add an a new record

Input the percentage distribution to be applied to this index

- Click the SAVE button to save any distribution changes.
- After the final adjustment to the labor distribution is made, click the button COPY JOB DISTRIBUTION TO POSITION.

NOTE:

- Labor distributions **must** equal 100% and are to be input as they are to be charged on July 1st. The Save button will gray out and you will not be able to save changes unless the distribution equals 100%.
- **Any** valid index, whether unrestricted or restricted, may be used for the labor distribution.

*** END ***