

# BUDGET PLANNER

## SALARY PLANNER



### SP-105 Apply Annual Increases In Salary Planner – 9 Month Faculty

Date Issued/Rev: 4/5/2010

**General Description:** This procedure explains how departments/end users will access and apply annual increases to 9 Month Faculty jobs and positions in Salary Planner using LoboWeb.

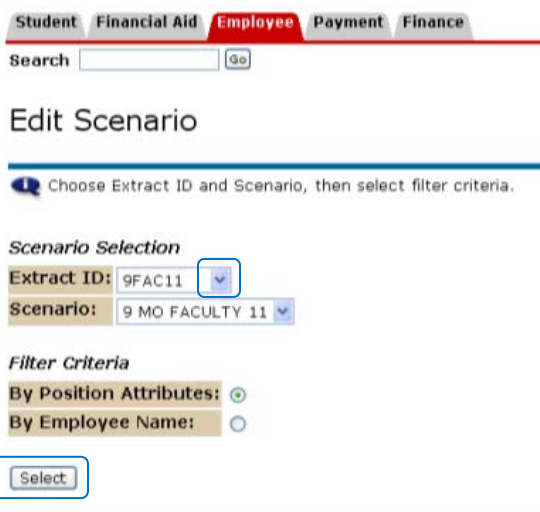
**Responsible Departments:** Office of Planning, Budget, & Analysis and  
Main Campus Faculty Contracts & Services Office

**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 9 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: 9FAC11

Scenario: 9 MO FACULTY 11

**Filter Criteria**

By Position Attributes:

By Employee Name:

- **Extract ID:** Click drop down arrow and select 9FAC11
- **Scenario:** 9 MO FACULTY11
- **Filter Criteria:** By Position Attributes
- Click “Select”

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**Position Filters**

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

9FAC11, 9 MO FACULTY 11

- 1) Organizations:   
 023A - SOE Mechanical Engineering  
 028A - CASAA Department
- 2) Include Subordinate Organizations:
- 3) Employee Class:   
 F9 - 9 Month Faculty
- 4) Bargaining Unit:   
 None
- 5) Faculty Rank:   
 None
- 6) Include Pooled Positions:
- 7) Include Vacant Positions:
- 8) Number of Records per Page:

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 9FACXX 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 9FACXX 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: Both

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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### 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

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**567A – Department of Xology**

ID and Name	Position, Suffix and Title	Employee Totals	
		Appointment Percent	Salary
<a href="#">102999000 Bennett, William</a>	<a href="#">F91777-00 Associate Professor</a>	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.

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### 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: William Bennett 102999000  
 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
<a href="#">F91777-00 Associate Professor</a>	<a href="#">574A – Department of Xology</a>	100.00	<input type="text" value="100.00"/>	99,415	<input type="text" value=".00"/>	<input type="text" value=".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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### 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
<a href="#">F91777-00 Associate Professor</a>	100.00	100.00	

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

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### Position Detail

**Mass Changes**

Percent:  ←

Amount:

Apply

\* - indicates a required field.

**Budget Detail for Position F91777-00 Associate Professor**

Model:	Proposed	Base	Current
Fiscal Year Budget:	101,403.00	99,415.00	99,415.00
FTE: *	<input type="text" value="1"/>	<input type="text" value="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"/>		

**Position**

Organization: 574A – Department of Xology

Type: Single

Begin Date: Jul 01, 2007

End Date:

Status: Active

Save Reset Previous Next

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.

**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:** DO NOT budget for promotions. Promotion dollars are funded by a separate allocation from the Provost and will be added to contract salary AFTER promotion decisions are finalized.

**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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### 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: William Bennett 102999000  
 Position-Suffix and Title: F91777-00 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	

Add New Record

**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

Save Copy Position Distribution to Job Copy Job Distribution to Position

[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 1<sup>st</sup>. 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.

**Special Administrative Component (SAC)**

- **New for FY 2010-2011:** SACs will be extracted in Salary Planner as a secondary job for faculty who held a SAC in FY 2009-2010.
  - Include the amount of the SAC in the position budget and in the secondary job. **DO NOT** include the amount of the SAC on the primary job record along with the 9 month base; only include it in the secondary job record.
  - If the faculty member will NOT be paid the SAC for 2010-2011, zero out the job and reduce the position budget by the amount of the SAC. Indicate in the job comments that the faculty member will not be paid the SAC for 2010-2011.
  - If a different faculty member will be paid the SAC, you **cannot** add a secondary job in salary planner. Budget for the SAC in the position budget and put comments in the position budget comments section indicating how much the 9 month base is and index to be paid from; SAC amount and index to be paid from. **DO NOT** budget the amount of the SAC on the primary job record along with the 9 month base; include it in the position budget only.
    - Note: Faculty members who will have new administrative duties in FY11 also require a contract memorandum.

General Note:

- Annual percent increases are NOT applied to SACs. If increases were “mass applied”, be sure to manually remove any increases made to a SAC amount.

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Employee Detail

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

Mass Change

Hourly or Salary:

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

Employee

Name and ID: Virginia Clark 102977991  
 Home Organization: 567A Department of Xology  
 Last Review Rating: -

Here is an example of what the extracted jobs will look like for a 9 month faculty member who receives a SAC for serving as Department Chair.

Note that the position suffix for the 9 mo base job will be **00**. The position suffix for the SAC will be **S1**.

Extracted Jobs

Position Suffix and Title	Organization	Base Appointment Percent	Proposed Appointment Percent	Base Salary	Annual Salary Increase Perce
F91888 - <b>S1</b> Chairperson	567A – Department of Xology	100.00	<input type="text" value="100.00"/>	5,000.00	<input type="text" value=".00"/>
F91888 - <b>00</b> Chairperson	567A – Department of Xology	100.00	<input type="text" value="100.00"/>	88,625.00	<input type="text" value=".00"/>
<b>Total:</b>				93,625.00	

**Sabbatical**

Sabbatical salaries should be budgeted as follows:

- Full base salary for regular one-semester sabbaticals at full pay
  - 0.670 times base salary for regular one-year sabbaticals at 2/3 pay
  - 0.835 times base salary for mini-sabbaticals (one semester at 2/3 pay)
  - 0.835 times base salary for regular one-year sabbaticals at 2/3 pay that span two academic or fiscal years.
- FTE changes will be applied on the “Position Detail” page. Two ways to get there:
- On the List by Employee page, click on [ID and Name](#) to get to the Employee Detail page, then click on [Position Detail](#) on the far right.
  - On the List by Position page, click on [Position & Title](#). Note: you will have to know which position you want to modify. Names are not displayed on the List by Position page.

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Position Detail

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Mass Changes

Percent:

Amount:

\* - indicates a required field.

*Budget Detail for Position F91777-00 Associate Professor*

Model:	Proposed	Base	Current
Fiscal Year Budget:	<input type="text" value="99,415.00"/>	99,415.00	99,415.00
FTE: *	<input type="text" value=".835"/>	1	1
Appointment Percent:	100.00	100.00	100.00
Total Salaries:	99,415.00	99,415.00	
Estimated Fiscal Year Budget:	99,415.00		
Exclude from Totals:	<input type="checkbox"/>		

*Position*

Organization: 574A – Department of Xology

Type: Single

Begin Date: Jul 01, 2007

End Date:

Status: Active

Enter the FTE here for the upcoming fiscal year according to the rules above. Click the SAVE button to save your changes.

- Reduce the amount on the job record accordingly. Go to the Employee Detail page to make changes. Include comments indicating when the sabbatical is taking place and note the regular 9 month base amount.
- Check with your School/College Fiscal Agent for guidance on how to budget the position budget sabbatical savings.

**Comments****➤ When to complete a comment and what to include:**

- Less than 1.00FTE – indicate the 9 month base salary for faculty not at 1.00FTE.
- Joint appointments or split labor distributions - indicate percentage split/amount and the indices to be paid on.
- Sabbaticals – indicate sabbaticals at .67FTE, .835FTE, and 1.00 FTE and the semester of the sabbatical. Indicate the amount of the 9 month base.
- Leave without pay (LWOP). Indicate the 9 month base and where the funds are being held.
- Retirements – indicate date of retirement if known and where the funds will be moved to.
- New Faculty – indicate start date, whom they are replacing, and where the funding came from.
- Increases – indicate the actual percentage/amount of increase whenever the percentage change on the salary planner working report shows a different percentage change than the actual percentage of the increase, ie: if the faculty member is on sabbatical, split distribution, previous year promotion; or returning from sabbatical or LWOP.
- Promotion – Indicate if the faculty member received a promotion the previous year.
- Special Administrative Component (SAC) – reason for SAC (Department Chairperson, Program Coordinator, Associate Dean, etc.) and the index the SAC is to be paid from if different than the index that the 9 month base is paid from. Include a note to remove a SAC for a faculty member who will not receive it in the upcoming fiscal year.

**➤ What NOT to include in the comments:**

- DO NOT include personal information about the faculty member in the comments, such as due to medical leave or due to divorce, etc.

**➤ Job vs. Position comments**

- Both will show on the salary planner working report. Use the job comments unless the position budget differs from the job or if you want to describe a change to the position budget.

**To get to the job comments:**

- On the List by Employee page, click on [ID and Name](#)
- On the Employee Detail page click on [Comments](#) on the far right.

**Job Comments**

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Your changes were applied successfully. ← This message will appear after clicking the save button.

<b>Name and ID:</b>	Joseph Donnelly 102998813
<b>Position-Suffix and Title:</b>	F92223 Associate Professor
<b>Last Updated by:</b>	Daniel Riley
<b>Last Updated on:</b>	Mar 29, 2010
<b>Comments:</b>	Donnelly - 9 mo base \$57,543. Sabbatical during Sem I, continuation of 2/3 pay during Sem II of 2009-2010. Total pay of \$48,048 and .835 FTE for 2010-2011.

← Remember to save your comments.

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**To get to the position comments:**

- On List by Employee page, click on [ID and Name](#).
- On the Employee Detail page click on [Position Detail](#) on the far right.
- On the Position Detail Page click on [Position Budget Comments](#) at the bottom of the page.

**Position Comments**

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<b>Position and Title:</b>	F92223 Associate Professor
<b>Last Updated by:</b>	Daniel Riley
<b>Last Updated on:</b>	Mar 20, 2010
<b>Comments:</b>	Donnelly - Sabbatical savings of \$9,495 and .165FTE held in Dean's Instructional Contingency index 567000 2010-2011.

**Other Information**

- Visiting Faculty – Submit a Contract Memo
- Research Faculty – Submit a Contract Memo unless the funds are unrestricted.

**\*\*\* END \*\*\***