

**Salary Planner Functionality**

Question	Answer
<b>What replaced the previous Budget Create Tool?</b>	<p>The Budget Create Tool, utilized with the legacy system, was replaced with two separate new tools within Banner to develop an overall budget:</p> <ul style="list-style-type: none"> <li>• The Finance Budget Development Tool: used by departments to enter changes to their new fiscal year operating budget.</li> <li>• The HR Salary Planner Tool: used by departments to enter annual salary changes, title and FTE changes on Academic jobs, and account changes--for automatic update to both position budgets and employee job records.</li> </ul>
<b>What does the HR Salary Planner Tool do?</b>	<p>Personnel and position budgeting is handled through the HR Salary Planner Tool. This is equivalent to the former annual reappointment and salary increase process for Civil Service Open Range employees and budgeted Academic employees--with the addition of position budget updates as required by Banner.</p> <p>In the HR Salary Planner Tool, departments are able to complete the following personnel actions:</p> <ol style="list-style-type: none"> <li>1. Salary changes for individual employees, entered as either a flat dollar amount or a percentage increase, or a combination of the two.</li> <li>2. Mass salary changes across a group of employees, entered as either a flat dollar amount or a percentage increase, or a combination of the two.</li> <li>3. FOAPAL account labor distribution changes on positions and/or jobs.</li> <li>4. FTE changes for Academic jobs only (with supporting documentation and approval).</li> <li>5. Title changes on Academic jobs only (not positions – with supporting documentation and approval).</li> <li>6. Civil Service title and FTE changes must be processed through the Central HR offices.</li> </ol> <p>Additionally, units are able to:</p> <ol style="list-style-type: none"> <li>1. Exclude employees from totals in a scenario.</li> <li>2. View and update information by job, position, job labor distribution, and/or position budget distribution.</li> <li>3. Query data across scenarios and/or extracts.</li> <li>4. Query against a scenario, including totals.</li> <li>5. Query an employee and view jobs across account codes.</li> <li>6. Save scenarios for future review and edit.</li> <li>7. Copy job labor distribution to the position or vice versa.</li> <li>8. Download extract scenario to a file, such as Excel.</li> <li>9. Calculate estimated fiscal year budget for a job and/or a position based on the proposed salary, base salary, and fiscal year factor.</li> <li>10. Round mass increase amounts. For Academic positions it is recommended that the rounding be set to 1.00.</li> <li>11. Prorate flat amount increases based on FTE or appointment percent.</li> </ol>

## Security Roles

### Question

### Answer

**What are the security roles for accessing the Salary Planner Tool?**

The Salary Planner Tool has two security roles: Master Salary Planner and Human Resources Manager. The Master Salary Planner (MSP) role is held only by individuals in the central HR and/or Budget office. The Master Salary Planner/s will extract the selected population of data from Banner and create scenarios. Individuals in a unit who have been designated with the Human Resources Manager role have access to edit a scenario and copy one scenario to another scenario in order to implement their unit's HR changes. Unit query and update access is based on the organization security and hierarchy structure established for Banner.

## Creation of the Extracts and Scenarios

### Question

### Answer

**What initial salary amounts are reflected in the Salary Planner Tool?**

The process of pulling employees into the Salary Planner tool is a two-part process. First, positions that meet selection criteria will be extracted for inclusion. Second, jobs assigned to these positions will be selected. The current salary assigned to the employee in the job will be pulled into the Salary Planner.

**What selection criteria are used for selecting positions and jobs for inclusion in the extract and scenarios?**

Positions and jobs are selected for extraction based upon the following criteria:

#### Positions:

- Civil Service Open Range positions. Established, prevailing, negotiated, student, and extra help employees will be excluded from the extract.
- Academic positions. Academic hourly, post docs and interns, residents, pre-docs, academic unpaid, retiree, and graduate hourly employees will be excluded from the extract.  
(For the Urbana and Chicago campuses, budgeted Post Doc positions will be included in the extract and scenarios.)
- Active positions with designated Budget Profile codes (R, B, N, RO, NO, BO, V), including vacant and visiting positions.
- Positions with effective date of 8/16 for Academic positions and 8/25/2019 for Civil Service. Any positions with end dates prior to these effective dates will not be included.
- Pooled positions will not be included in any extract.

#### Jobs:

- Jobs that are active as of 8/16 for Academic and unpaids and 8/25/2019 for Civil Service Open Range.
- Primary and secondary jobs will be selected if the date criteria are met.
- One-time payments, summer pay, and lump sum payments will be excluded.

---

**What are the Budget Profile codes in Banner?**

Budget Profile codes are equivalent to the Budget Reference Code in the legacy system and will determine which positions are pulled into the Salary Planner; units are required to keep this code up-to-date for new and modified positions.

- X – Not Budgeted
- R – Recurring State or ICR funds
- N – Non-Recurring State Funds (this code can only be used with FOAPALS that are equivalent to legacy Ledger 1 funds)
- B – Self-supporting, Grant, or MSP/DSP Funds
- RO – Civil Service Open Range, Recurring State or ICR Funds
- BO – Civil Service Open Range, Self Supporting Grants or MSP/DSP Fund
- NO – Civil Service Open Range, Non-Recurring State Funds
- V – Visiting Academic Professional

Units will need to review the Budget Profile codes assigned to their positions to ensure accurate coding. Some positions will have a Budget Profile code of “M” indicating multi funds. This code was derived from the Banner conversion process when two or more appointments with different budget reference codes were consolidated into one position. These positions will need to be updated with the appropriate Budget Profile code to be included in the Salary Planner extract.

---

**How many extracts are created?**

Master Salary Planners create two extracts per chart of account: one for Academic, the second for Civil Service. A practice version of these extracts will be made available in mid-May. A production version of the extract will be made available in early June. In each case (practice and production), all positions and jobs that meet selection criteria will be included in the extracts. Scenarios will then be created from each extract (if applicable per COA): an initial scenario, identical playground/practice scenarios, and a final scenario to be uploaded back to Banner. Units should make no changes to the initial scenario. Up to three playground/practice scenarios can be created. Final numbers are copied to the final scenario for upload to Banner.

---

**Can units create additional scenarios if desired?**

No, units will not have the correct security to create scenarios. Only the Master Salary Planner can create scenarios. However, units may download scenarios to an Excel spreadsheet for additional modeling.

---

## Unit Budget Scenarios and Upload Process

Question	Answer
<b>What do units need to do to ensure that appropriate positions and jobs are pulled into the extract and scenarios?</b>	<p>Units will need to ensure that positions and jobs are correctly coded to be included in the extract. Two time periods will exist for ensuring coding changes are correct. The first time period is before creation of the practice extracts. The second time period is between the creation of the practice and final extracts. Units are encouraged to begin the clean-up process as soon as possible to ensure that positions/jobs are appropriately reflected in the final extract. All changes to job and position records must be made in the HR Front End.</p> <p>Extracts will be updated periodically until final data are due to the Master Salary Planner for upload into Banner. The extracts are updated by the Master Salary Planner by running the Add/Delete process. If changes by units are made in Banner job and/or position records prior to the final Add/Delete, the data in the Salary Planner Tool will reflect the changes. If changes are made after the final Add/Delete is performed, then they will not appear in the Salary Planner Tool scenarios. Only the following changes in Banner will appear in the Salary Planner via the Add/Delete process:</p> <ul style="list-style-type: none"><li>• <b>New</b> positions and jobs will be added to the extract, providing they meet selection criteria.</li><li>• Terminated jobs and positions will be removed.</li><li>• Positions with Budget Profile code changes will be added or deleted from the extract.</li><li>• Changes in job FTE and salary will appear in the Salary Planner in the “Current” column, as the changes are made in Banner.</li></ul> <p><b>Note:</b> If the Position/Job is already in the Extract at the time of the Add/Delete, a change in Banner to the salary, FTE, FOAPALS, etc., will <b>NOT</b> appear in the extract and scenarios.</p>
<b>Will restrictions be imposed on processing Banner transactions during the Add/Delete process?</b>	<p>The Add/Delete process will be completed in off-business hours. During that time, positions and jobs will be locked in Banner and transactions will not be allowed.</p>
<b>What should a unit do if a person or position is not reflected in the extract, but should be?</b>	<p>Verify that the correct information is in the HR Front End and process any necessary transactions prior to the final Add/Delete process.</p>
<b>What should a unit do if a person or position needs to be deleted from the extract?</b>	<p>If the final Add/Delete process has not occurred, the unit should make the necessary corrections in the HR Front End (change Budget profile on position, end the job, or end the position). If after the final Add/Delete process, the unit may select “Exclude from Totals” in the Salary Planner Tool for that particular job or position.</p>

<b>When will changes reflected in the Salary Planner become effective?</b>	The changes will become effective when the final extract is uploaded into the production tables. For Academic, unpaid, and GA positions and jobs, the effective date will be 8/16. For the Civil Service Open Range positions and jobs, the effective date will be 8/25/2019.
<b>Will the Personnel and Effective dates be populated for units when they access the scenarios?</b>	The assignment of the Personnel and Effective dates is part of the upload process. Units do not need to enter these fields.
<b>How are the final scenarios applied to Banner?</b>	Once a scenario has been finalized, the proposed changes will be automatically applied, by the Master Salary Planner, via the upload process. The changes will be applied to Banner in two ways. Position budget and labor distribution data will be loaded directly into the appropriate tables in Banner. Meanwhile, all changes to job information will be applied in Banner via EPAFs. The EPAFs will be originated automatically as part of the final scenario upload process. The EPAFs will update appropriate job records automatically and produce a history record tied to the job. The EPAF transaction number will provide a record/history of the salary change for a job.
<b>Who reviews the EPAFs created by the Salary Planner upload process?</b>	The EPAFs created are automatically applied to Banner. Therefore, information from the Salary Planner final scenarios should be reviewed by units for accuracy and approved by the appropriate campus authorities prior to submission.
<b>What happens if an EPAF is not applied during the upload process?</b>	Error reports will be generated by the upload and mass EPAF application processes. The reports will be produced by chart of account, extract, and scenario. The Master Salary Planner assigned for each campus will review the error reports and contact units as necessary to resolve any issues.
<b>What specific fields for the job and position will be updated by the Salary Planner?</b>	The following fields will be updated by the Salary Planner: <ul style="list-style-type: none"> <li>• Position Budget: Date Created, Budgeted FTE, and Budgeted Salary</li> <li>• Position Labor Distribution. FOAPAL, Percent</li> <li>• Jobs: Effective Date, Personnel Date, Title, Job FTE, Appointment Percent, Hours/Day, Hours/Pay, Default Hours, Salary Grade, Salary Table, Salary Step Rate, Annual Salary, Job Change Reason</li> <li>• Job Labor Distribution: FOAPAL fields, Percent.</li> </ul>
<b>Once the Salary Planner generates updates, are additional updates required to meet fiscal year budgeting requirements?</b>	The Mass Salary Planner update will update position budget, position labor distribution, job, and job labor distribution on the job. Any changes to these fields not accomplished via the upload should be updated at the time the change occurs.

## Special Processing Requirements

Question	Answer
<b>Can a unit apply sequential salary increases using the Salary Planner or are multiple increases applied to the same base salary amount?</b>	Any increases processed by the Salary Planner will be applied to the same base salary amount.
<b>Can a unit apply an across the board increase for all jobs, and then make changes for a specific individual?</b>	Yes.
<b>How do units process reappointments with no salary increase?</b>	Units should indicate no salary increase for that job and position in the Salary Planner by leaving the salary increase field blank or entering a zero.
<b>Are there personnel transactions that are not done in the Salary Planner Tool?</b>	<p>Yes, the following personnel transactions will need to be completed in Banner or the HR Front End, NOT in the Salary Planner Tool.</p> <ol style="list-style-type: none"><li>1. New hires</li><li>2. Leaves of absence</li><li>3. Tenure changes</li><li>4. Terminations</li><li>5. Job additions</li><li>6. Job deletions</li><li>7. Terminal notice</li><li>8. Service code changes and associated salary changes (months of service)</li><li>9. Home organization changes</li><li>10. Transfer of employees between departments</li></ol> <p>To process these transactions, sequencing and timing of processing will need to be coordinated with the Salary Planner upload. Once the timing has been confirmed, final instructions will be communicated. Processing freeze dates may be enforced during the months of July – August to coordinate direct Banner updates with Salary Planner and mass update processes.</p> <p>As a general rule the following guidelines apply:</p> <ul style="list-style-type: none"><li>• Position and job records entered into the HR Front End prior to the final Add/Delete will be reflected in the Salary Planner (providing the effective date on the record is prior to or equal to the 8/16 (Academic) and 8/25/2019 (Open Range) budget dates, and the end date is not prior to these dates). These records should be updated via the upload process.</li></ul>

- Any job records effective 8/16 will be overridden when the Salary Planner generated EPAFs are applied.
- Future dated records with effective dates later than the budget effective dates (8/16, 8/25/2019) will not be pulled into the Salary Planner. These records should be carefully audited to ensure that conflicts do not exist.
- Any manual updates to job and position records extracted to the Salary Planner should occur prior to the last Add/Refresh process, or be held until after the upload process has occurred.
- It is recommended that tenure changes be applied to jobs after upload.
- It is recommended that home department changes, e-class changes, and/or transfers between departments be completed prior to the last Add/Delete. If not possible, it is recommended that these changes be held until after the upload process has occurred.
- It is recommended that terminal appointments, new jobs, and job deletions be completed after the upload if not completed prior to the last Add/Delete.

See FAQs below on hires, terminations, and leaves.

---

**If an employee is hired after the final update (Add/Delete) to the Salary Planner Tool extract and scenarios, is there anything in particular that the unit will need to do?**

The employee should be processed to a job as a normal hire. If the position to which the employee is appointed was extracted to the Salary Planner, the position budget amount may need to be updated after the upload to ensure it matches the new hire's salary information. If the position is new and was not created in time to be included in the Salary Planner, the unit will need to create a budget for the coming year, indicating working status. If the new hire start date is prior to the budget update date (8/16, 8/25/2019), a budget for the current year should also be created.

---

**If an employee terminates after the Salary Planner is finalized and before the upload, will the position be updated? Will the EPAF for the job error out and not update the Job?**

As long as the position has a budget designated as "working" and does not have an end date prior to the upload, it will be updated. The EPAF will error out if the job it is set to update is in a status of terminated.

---

**What happens to an employee's record if they return or go on leave after the Salary Planner is finalized and prior to the upload?**

If the unit has ensured that the job record reflects the leave return or departure prior to the Salary Planner upload process, the EPAF will error out. The Master Salary Planner and employing units will want to check these cases and make necessary changes to ensure proper pay and record-keeping.

---

<b>Should Salary Commitment and Contract Parameter fields be updated to reflect budget changes? If so, what is the process?</b>	Yes, updates to these fields will be included as part of the Salary Planner upload process. However, if a position or job is not included in the Salary Planner, then the unit will need to update these fields manually.
<b>Are there any special processing/timing issues related to processing of split appointments (jobs)?</b>	The organization that owns the job will process any changes through their final scenario. If the individual in the unit has security access to all of the organizations in which the employee has jobs, they will see all jobs for the individual. Otherwise, only the organizations that the individual has security access to will be shown. The unit that shares the job, but does not own the job, is able to see the job in their Salary Planner scenario but cannot make changes.
<b>How should units process salary increases /reappointments for jobs and updates for positions that are not pulled into the Salary Planner extract?</b>	Updates to jobs and positions that are not part of the mass upload will need to be done manually by the units or Central HR, dependent on the position type and campus policies.
<b>Position Maintenance</b>	
<b>Question</b>	<b>Answer</b>
<b>What process should units follow to reflect a position differently in budget (FTE, labor distribution) versus what is entered at the job level for pay?</b>	Within Salary Planner, position budget information can be copied to the job budget information as well as the reverse. If the information is to be reflected differently, then it will need to be entered separately for the position and the job.
<b>What is the position labor distribution?</b>	The position labor distribution specifies the account/s within the departmental budget to which the position will be charged. The sum of all labor distributions for a position should equal 100%, regardless of position FTE. During the upload process, position labor distributions will be updated as well as job labor distributions.
<b>How does labor distribution percent relate to job FTE?</b>	The labor distribution specifies the percent of the job appointment to be funded from a particular account. Job FTE reflects the percent time appointment. For example, John Smith is appointed to a job 100% time. His job is paid 50% from one account distribution and 50% from a second account distribution.



<b>Can a position owned by a unit be assigned a labor distribution in another unit?</b>	No, if a position is to be funded by another unit then that unit must also establish a position.
<b>When do units need to establish a new position vs. reusing an existing position?</b>	A new position and new position number are only required if one of the following is true: the position is a newly established position; the position is changing from one employee group to another (e.g., from Civil Service to Academic Professional); or the position moves from one campus to another. A position is <b>not new</b> and the position number <b>does not change</b> if a vacant position is re-filled, or if a position moves from one organizational unit to another within a campus location. Likewise, no change is necessary if the position class, employee class, or similar position attribute changes within an employee group.
<b>When should a position be specified as inactive?</b>	A position should be specified as inactive when there is no intent to use the position within the budget year, but there is an interest in keeping the position on record for future use.
<b>When should a position be eliminated from a budget?</b>	A position should be eliminated from a unit's budget when there is no longer intent to fill the position in the future. If there is reason to believe that the unit may reuse the position in the future, the position should be maintained with no salary commitment. The unit should remove the budget profile code from that position record. This will remove the position from the Salary Planner extract and scenarios.