8.9 HRMS Step-by-Step Guide

Salary Upload – Faculty and University Staff on Salary-Planning Page

Overview: This guide provides instruction on reviewing and updating faculty and university staff salary changes.

Note: The screen shots used in this guide may not be representative of your access.

1. Navigate to Salary Planning CU
   - Workforce Administration
   - Job Information
   - Sal Planning CU

2. Salary Planning CU page displays
   - Workforce Administration
   - This page will always default to “Correct History”. Do not change it; you must be in this mode to enter data into these pages.
   - Search by Department number & Personnel Group OR
   - Enter EMPLID or Name (Include space after the comma and First Name)
   - Click the magnifying glasses to find valid values.

Salary Planning CU
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

<table>
<thead>
<tr>
<th>Department:</th>
<th>begins with</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel Group:</td>
<td>begins with</td>
</tr>
<tr>
<td>EmplID:</td>
<td>begins with</td>
</tr>
<tr>
<td>EmplRcd Nbr:</td>
<td>=</td>
</tr>
<tr>
<td>Name:</td>
<td>begins with</td>
</tr>
<tr>
<td>Last Name:</td>
<td>begins with</td>
</tr>
<tr>
<td>SetID:</td>
<td>begins with</td>
</tr>
</tbody>
</table>

Correct History

Search  Clear  Basic Search  Save Search Criteria
3. **Lookup Personnel Group values**
   - Click the magnifying glass to find valid values.
   - Personnel Group values are one-letter codes.
   - Click on the Letter or Description link (like [E, Exempt Professional])

4. **The Sal Planning CU search page displays with the selected value.**
   - Click on Search
   - Using both DeptID & Personnel Group is recommended to speed up the search.

   *The performance of this search view may vary, especially if you have multiple departments in your row level security profile or the department is very large.*

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**Find an Existing Value**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>begins with 20133</td>
</tr>
<tr>
<td>Personnel Group:</td>
<td>begins with E</td>
</tr>
</tbody>
</table>

**Look Up Personnel Group**

Field Value: begins with

- Look Up
- Clear
- Cancel
- Basic Lookup

**Search Results**

<table>
<thead>
<tr>
<th>Field Value</th>
<th>Translate Long Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>C</td>
<td>Clinical Faculty</td>
</tr>
<tr>
<td>E</td>
<td>Exempt Professional</td>
</tr>
<tr>
<td>F</td>
<td>Regular Faculty</td>
</tr>
<tr>
<td>M</td>
<td>Medical Residents</td>
</tr>
<tr>
<td>R</td>
<td>Research Faculty</td>
</tr>
<tr>
<td>T</td>
<td>Student - Colorado Springs</td>
</tr>
</tbody>
</table>

**Sal Planning Cu**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department:</td>
<td>begins with 20133</td>
</tr>
<tr>
<td>Personnel Group:</td>
<td>begins with E</td>
</tr>
<tr>
<td>EmplID:</td>
<td>begins with</td>
</tr>
<tr>
<td>Empl Rcd Nbr:</td>
<td>begins with</td>
</tr>
<tr>
<td>Name:</td>
<td>begins with</td>
</tr>
<tr>
<td>Last Name:</td>
<td>begins with</td>
</tr>
<tr>
<td>SetId:</td>
<td>begins with UCOLO</td>
</tr>
</tbody>
</table>

- Correct History
- Search
- Clear
- Basic Search
- Save Search Criteria
5. **Search list is displayed.**

- Search results can be sorted by clicking on column headers, if necessary
- Click on the desired employee.

### Sal Planning Cu

Enter any information you have and click Search. Leave fields blank for a list of all values.

- **Find an Existing Value**

| Department: | begins with 20133 |  |
| Personnel Group: | begins with E |  |
| EmpID: | begins with |  |
| EmpID Rcd Nbr: | = |  |
| Name: | begins with |  |
| Last Name: | begins with |  |
| SetID: | begins with UCOLO |  |

**Correct History**

[Search] [Clear] [Basic Search] [Save Search Criteria]

### Search Results

<table>
<thead>
<tr>
<th>View All</th>
<th>First</th>
<th>1-28 of 28</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Personnel Group</td>
<td>EmpID</td>
<td>EmpID Rcd Nbr</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>103414 0</td>
<td>Employee, F</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>109150 1</td>
<td>Employee, K</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>133009 0</td>
<td>Employee, X</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>140660 0</td>
<td>Employee, G</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>149726 0</td>
<td>Employee, P</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>161825 0</td>
<td>Employee, N</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>161837 0</td>
<td>Employee, M</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>164016 0</td>
<td>Employee, Q</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>167972 0</td>
<td>Employee, W</td>
</tr>
<tr>
<td>20133</td>
<td>E</td>
<td>176472 0</td>
<td>Employee, A</td>
</tr>
</tbody>
</table>
6. **Salary Planning Page is displayed**

- The salary planning page displays the current job details for the employee.
- Past salary planning upload entries are not shown on this page.
- Job data history is not displayed on the salary planning page, but you may click on the **Job Data** link to verify information as needed.

7. **Appointment End Date field**

- The current Appointment End date is displayed with the current job data, if applicable.
- Enter a new date in the **Appoint End Dt** field, if needed.
- If the field is blank, the old appointment end date will be removed when the upload is processed.
8. **Update Salary Information**

- Be sure you are looking at the correct employee record number & verify that the pay status is **not terminated (‘T’)**.

- Enter the updated salary amount in the **New Comp Rate** field.

- Click **Calculate Total Compensation** to calculate and display the Total Compensation Amount and % increase.

- Update appointment end date (if applicable) for each employee.

- Be sure to click **Save** when you have finished your update, before moving to next employee.

Click to move through your list of employees
9. **MCOPs in Salary Planning**

- Multiple Components of Pay (MCOPs) allow departments to break down an employee’s salary into specific pieces or components using rate codes.

- Rate codes with the letters “BAS” include the amount as part of the total base rate. Other codes (ADM…, SUP…) will create separate payments outside of base pay.

- Check with your approval authority before using MCOP rate codes.

- Salary planning will display the current rate codes from Job Data. You can change the comp rates for any of the codes, and you can insert or delete rows as needed. *(Only the rate codes that are appropriate for the employee’s job code will be displayed as selection options.)*

- Remember to click the “Calculate Total Compensation” button and SAVE.

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**NOTE:** For contract pay frequency (BASEC) and hourly (BASEH) employees, you cannot enter multiple rows with different compensation rate codes. You can only update the salary amount for the existing comp rate.

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![Salary Planning](image-url)
10. Medical Residents - SPECIAL ACTION

- Enter the next job code in the sequence.
  
  Example:
  
  *For this employee, enter job code 3104*
  
- Enter compensation changes as described previously, and SAVE.
  
- During the upload, both job and position data will be updated to reflect the job code change.

11. Contract Faculty - SPECIAL ACTION

- For faculty members paid on academic year (9-month) contracts, the salary upload page can be used to update their appointment data for the upcoming academic year.
  
- Comp Frequency will show “Contract”, and the type of contract will be displayed by the department description.
  
- Even if there is no change to the contract amount, the contract comp rate must be added for the upload

Contract type (Fac 9/9, Fac 9/12) cannot be changed on the salary planning page. Any changes from current type must be entered manually into Job Data AFTER the upload has been processed.

There is a required election form required for faculty members who change to the 9/12 option, see the PBS website for more information.

https://www.cu.edu/pbs/payroll/groups/ay-appointments.html
12. Upload Process to Job Data

- The salary planning page is refreshed each night, and will show any job data updates the following day.

- Once you have entered salary planning data, please **DO NOT enter any additional rows in Job Data until the upload is completed**. The salary upload will only look at the “New Comp Rate” entered on the most current row in the salary planning page.

- FTE and % of time cannot be changed through the Salary Planning upload. Any changes to these fields must be entered separately into HRMS **after the upload process is complete**.

- After an upload occurs, the information will be maintained in the Salary Planning page for approximately six months. It will then be cleared from this page. The uploaded rows will always be visible in the Job Data pages.

Any rows updated in Job Data as part of the upload process will include a comment in Job Notes, and the upload process “PAY581CU” will be shown as “Last Updated By”.
8.9 HRMS Step by Step Guide
Salary Planning Table CU Report

Overview: Run this report prior to entering any new salary changes to obtain a complete list of employees in your department(s). Once data entry is complete, rerun this report to edit and/or verify all changes were entered correctly.

Note:
- Salary Planning Reports must be run in HRMS Production
- You must have a C:/TEMP folder on your hard drive in order to run this report. Open up your C: drive to verify you have a named “Temp”. If it does not exist, you will need to add a TEMP folder.

1. Navigate to Salary Planning Tbl CU Report
   - Workforce Administration
   - Plan Salaries CU
   - Salary Reports CU
   - Click on Salary Planning Tbl CU

2. Salary Planning Tbl CU search page displays
   - Click on Search to find an existing run control ID

3. Search Results display
   - Click on an existing Run Control ID or create a new ID
   - To create a new ID, Click on Add a New Value

4. Add a New Value page displays
   - Enter a new Run Control ID.
5. **Salary Planning Run Control page displays**

This report can be run for a single employee, department, campus and/or personnel group. You may also select combinations of the above parameters.

- Enter EmpID OR
- Enter a Dept ID from the Look Up list or leave blank to run for all departments (Based on row level security)
- "As of Date" is required. This date should be greater than or equal to the effective date of the new compensation.

For example, if the new compensation takes effect on July 1, 2008, your "as of date" should be greater than or equal to July 1, 2008.

6. **Process Scheduler page displays**

- Enter PSUNIX in the Server Name
- Verify the report type is Web and format is CSV (for report use in Excel)

Click OK
7. Salary Planning page re-displays

- Click on Report Manager
- Click the Refresh button until the report posts.

8. Click on the report Description Salary Planning Data
   (If a new window does not open, hold down the Ctrl key and click again)

   The report will open in spreadsheet format.