



MULTI-YEAR SALARY PLANNING

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INTRODUCTION

Multi-Year Salary Planning (MYSP) is intended to help you manage positions over time within your College, School, or Division. A Plan File is the form used to enter your multi-year salary planning data.

- Each Reporting Unit (College, School, or VP unit) has a MY Salary Plan File.
- Only Multi-Year Axiom users will have access to the MYSP plan file for their Reporting Unit.
- Positions appear in the plan files based on the home department of the position.
- An Axiom record is created within the MYSP for every active position within HCM except vacant grad assistant/advisor positions (GAs, GRAs, and GTAs), which are not displayed.
- Axiom MYSP is updated with data from HCM monthly from August till March. MYSP access closes end of March and reopens in August. Any future-year planning data entered previously by the user will be retained and not overwritten by the refresh.

Positions/Employees Included

The following positions and employee types are included in Axiom multi-year salary planning:

- Full-time faculty
- Full-time staff
- Graduate students with terms =12 months with a July 1st start date
- Pre/Post-doctoral fellows
- Post-doctoral associates

Positions/Employees Not Included

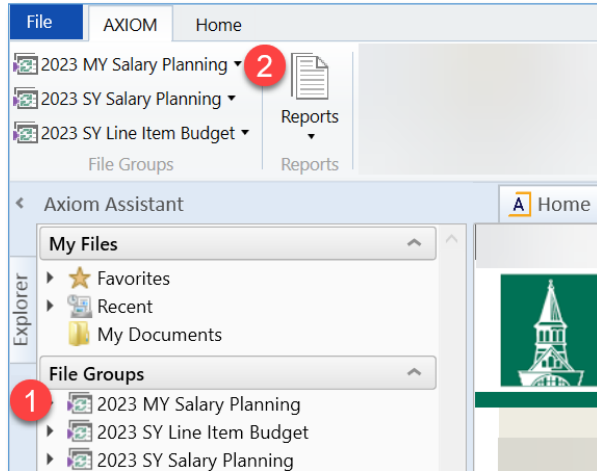
The following employee types are not included in Axiom multi-year salary planning:

- Part-time faculty (4-, 5-, 9-, 10-, 11- and 12-month)
- Graduate Students with terms <12 months
- Appointments with \$0 salaries
- Work-Study Employees
- Student Employees
- Temporary Employees

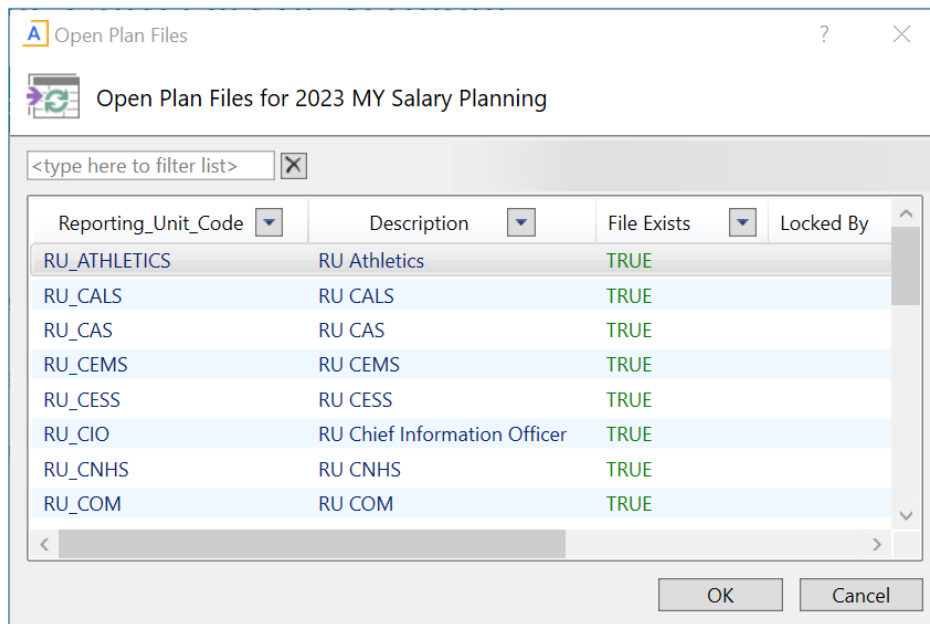


OPENING A PLAN FILE

1. To open a Plan File, (1) go to File Group and double-click on “MY Salary Planning 20XX” or (2) select :MY Salary Planning 20XX” from the Axiom ribbon.



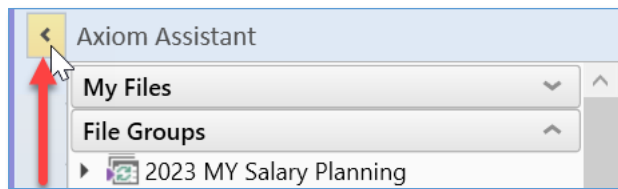
2. A pop-up window will open. You will see a list of the Reporting Units to which you have MYSP access. Select the Plan File you'd like to work on, or search from the list by entering the Reporting Unit name in the filter box. Double-click on the Plan File, or select it and click “OK.”





3. The Refresh Variables pop-up will open. **The MYSP plan files are quite large, because they are for an entire Reporting Unit.** Therefore, you are encouraged to use the refresh variables to isolate a smaller group of positions (or single position) to work on at one time. Click OK without selecting a filter if you prefer to start with all active positions in the Plan File; you will have the opportunity to filter later in the process if desired.

4. The multi-year salary planning worksheet will open. To maximize the input screen, click on the arrow next to Axiom Assistant to hide the left-hand navigation pane.





GENERAL NAVIGATION

Plan File Vertical Layout

Once in the plan file, there are three vertical sections:

1. The top section is **Filled Positions**.
2. The middle section is **Vacant Positions** (including the name of the most recent incumbent).
3. The bottom section is **Additional Salary Plans**. This section is a place to plan for New Positions, Pooled Positions, Additional Pay, Unallocated Salary Dollars, Wages, or other compensation-related expenses.

All information in white is pulled into Axiom from HCM monthly. Any field not white is an editable item. **None of the editable data passes back to HCM; all planning data are saved only in Axiom.**

The positions are listed in alphabetical order by the last name of the employee occupying the position (or the most recent incumbent for vacant positions).

	Employee	Job Code Description	Job Code	Union Code	Term	FTE	Home Dept.	Home Dept Name	Position Number	Status	Emp ID	Pay Group	Emp Rec	E-Level	Acct
1	Barbara, Frances	Spec Asst To President	0806	NU	12	0.8	10300	VP Legal Affrs & Gen Counsel	V00024494	Active	0064018	SM1		ES110	\$1100
	Collier, John J.	Administrative Counsel	3001	NU	12	1.0	10300	VP Legal Affrs & Gen Counsel	V003457	Active	0137171	SM1		ES200	\$2000
	Frederick, John C.	Administrative Counsel	3001	NU	12	1.0	10300	VP Legal Affrs & Gen Counsel	V00021807	Active	0114155	SM1	1	ES200	\$2000
	Hagen, John A.	Administrative Counsel	3001	NU	12	1.0	10300	VP Legal Affrs & Gen Counsel	V007334	Active	0103686	SM1		ES200	\$2000
2	Vacant Positions														
	Barbara, Frances	Vice Pres & Gen'l Counsel	1430	NU			10300	VP Legal Affrs & Gen Counsel	V003673	Vacant				<Acct>	!
	Stewart, Marlene K.	Office/Prgrm Support Generalist	2031	NU			10300	VP Legal Affrs & Gen Counsel	V004833	Vacant				<Acct>	!
	Stewart, Marlene K.	Office/Prgrm Support Sr	2041	NU			10300	VP Legal Affrs & Gen Counsel	V004054	Vacant				<Acct>	!
3	Additional Salary Plans														
	New Positions	Test	New	NU			10300	VP Legal Affrs & Gen Counsel	n.a.	Vacant	n.a.	n.a.	n.a.	ES200	
	Pooled Positions	Re-Test	New				10300	VP Legal Affrs & Gen Counsel	n.a.	Vacant	n.a.	n.a.	n.a.	ES061	

Plan File Horizontal Layout

The leftmost columns of the Plan File display **employee, job, and position data**: Employee Name, Job Title, Job Code, Union Code, Term, FTE, Home Dept, Home Dept Name, Position Number, Employee Status, Employee ID, Pay Group, Empl Record, E-level Account, and Wage/Salary Account, as shown above. These columns are associated with the **Summary** and **Employee Detail** plan file Views.

The middle columns of the Plan File display **salary increase data**. These columns are associated with the **New Year Salary** and **Outer Year Salary** plan file Views.

- The section in blue is for entering salary increases for the next fiscal year. How detailed you make it is up to you.
- The green, yellow, and grey columns are for entering projected salary increases for the three subsequent fiscal years.

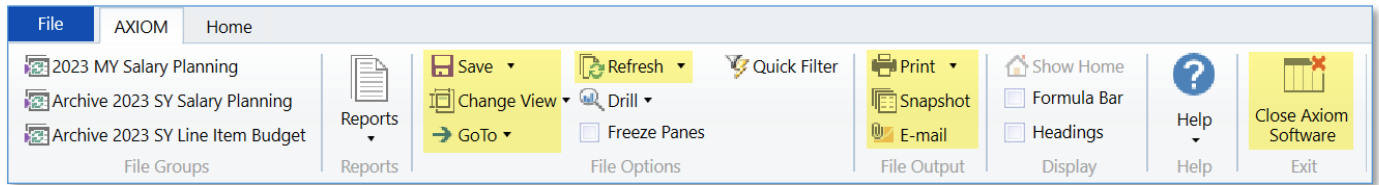
[illegible][illegible]

		<i>Fiscal Year</i>						<i>Salary Distributions</i>	
						Suspense Purpose 0010 & Other Funds RU Dept			
Employee		100	150	300,330	305	Gift/End 310-371			
		Suspense (Purp 0010) for all funds is located in "Other Funds" in current year							
		100%							
		80%				20%			
		100%							
		100%							



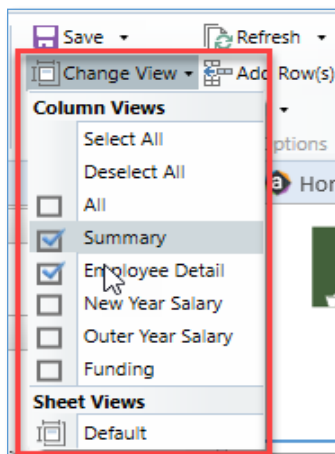
Axiom Toolbar

The Axiom toolbar contains several buttons for access to key functionality:



Save: Click “Save” (or CTRL-S) to save your data and reload the Plan File.

Change View: The “Change View” dropdown allows you to choose how many columns to display on the sheet:



“**All**” shows all columns on the sheet (this is the default view)

“**Summary**” shows limited information associated with each position (Job Code Description, Union Code, Term, FTE, Home Dept, Position Number, and E-Level)

“**Employee Detail**” shows all information associated with a position

“**New Year Salary**” shows columns for entering detailed salary increase data for the next fiscal year

“**Outer Year Salary**” shows columns for entering high-level salary increase data for the next 2-4 fiscal years

“**Funding**” shows columns for entering the planned salary distribution among Funds

GoTo: Use the “GoTo” dropdown to go immediately to either the Employee (top) section, the Vacant Position (middle) section, or the Add New Position (bottom) section.

Refresh: The “Refresh” button lets you filter your Plan File by Position Title or Number, Union Code, Term, FTE, Home Dept, Pay Group, Employee Status, Position/Plan File Section, or Last Initial Group to enter planning data for a single position or a subset of positions at a time.

Make sure to save your data prior to selecting “Refresh”.

Print: Print a hard-copy of the Plan File by selecting one of the layouts from the “Print” dropdown.

Snapshot: Use the “Snapshot” button to create an electronic copy of your Plan File that you can save locally and edit or annotate in Excel (outside of Axiom).

Email: Use the “Email” button to email a snapshot of the Plan File to yourself or a colleague.

Close Axiom Software: Click the “Close Axiom Software” icon to close the application when ready to exist Axiom software.

NOTE: The “Quick Filter” and “Drill” button are grayed out because this functionality is not applicable to salary planning. Use “Refresh” to filter your Plan File by specific employee characteristics.






OUTER-YEAR SALARY INCREASES

The information below pertains to the Filled Positions, Vacant Positions, and Additional Salary Plans sections.

The green, yellow, and grey columns in the middle of the Plan File are for entering projected salary increases for the three subsequent fiscal years beyond the next fiscal year (e.g., on Oct 1, 2022, FY24 would be the next/new fiscal year, and FY25, FY26, and FY27 would be the next three “outer years”).

Planned salary increases may be entered at a high-level (total \$ amount or total % increase) for the outer years as follows:

1. The first time you open the Plan File, the first outer-year salary (green column CV) is calculated based on the salary for the prior year (in this example, FY25).
2. To enter a salary increase, enter either (a) the planned total salary amount to be paid or (b) a formula in the green column (CV).
3. The resulting % increase will be calculated and displayed in the white column immediately to the right of the green column (CV).
4. Repeat step three for the remaining 2 outer years.

BG	CP	CQ	CRCU	CV	CW	CX	CY	CZ	DA	DB	DC
											
FY24		FY25		FY26		FY27					
Employee	Salary	% Increase	Salary	% Increase	Salary	% Increase	Salary	% Increase			
	\$19,234,068		\$19,234,858	0.00%	\$19,235,662	0.00%	\$19,235,662				
			1 \$40,246.75	2.00%	2 =CV60*1.02	3 2.00%	4				

Note:

- If the planning data entered differs from one year to the next, the number for the outer-most year will appear in red. This does not mean that there is an error; it just means that there has been a change. The red text is meant to draw your eye.



The rightmost columns of the Plan File display **salary distribution data**. These columns are associated with the **Funding** plan file View.

Salary Distribution functionality:

- | DE | DF | DG | DH | DI | DJ | DK | DL | DM | DN | DO | DP | DQ | DR | DS | DT | DU | DV | DW | DX | DY | DZ | EA | EB | EC | ED | EE | EF | EG | EH | EI | EJ | EK | EL | EM | EN | EO | EP | EQ | | | | | | | | | | | |
|--|-----|---------|-----|------------------|-------------|---------------|------|-----|---------|--|------------------|-------------|---------------|-----|-----|---------|-----|------------------|-------------|------------------|-----|-----|---------|-----|------------------|-------------|---------------|-----|-----|------------------|-----|------------------|-------------|---------------|----|-----|------|----|--|------------------|--|--|--|--|--|--|--|--|--|
| Fiscal Year 2023 Salary Distributions | | | | | | | | | | Fiscal Year 2023 ADU/STED Salary Distributions | | | | | | | | | | Fiscal Year 2024 | | | | | | | | | | Fiscal Year 2025 | | | | | | | | | | Fiscal Year 2026 | | | | | | | | | |
| Suspense Purpose 0010 & Other Funds | | | | | | | | | | 1 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | 4 | | | | | | | | | |
| 100 | 150 | 300,330 | 305 | Gift/End 310-371 | Other Funds | Other RU Dept | 100 | 150 | 300,330 | 305 | Gift/End 310-371 | Other Funds | Other RU Dept | 100 | 150 | 300,330 | 305 | Gift/End 310-371 | Other Funds | Other RU Dept | 100 | 150 | 300,330 | 305 | Gift/End 310-371 | Other Funds | Other RU Dept | 100 | 150 | 300,330 | 305 | Gift/End 310-371 | Other Funds | Other RU Dept | | | | | | | | | | | | | | | |
| Suspense (Purp 0010) for all funds is located in "Other Funds" in current year | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | 100% | 100% | | | | | | | | | | | | | 100% | | | | | | | 100% | | | | | | | | | | 100% | | | | | | | | | | | | |
| 11% | | | | 57% | | 32% | | | 25% | | 25% | | 50% | | | | | 25% | | 50% | 1 | | | | 25% | | 50% | | | | | | | 25% | | 50% | | | | | | | | | | | | | |
| | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | | | 100% | | | | | | | | | | | | | | | |
| | | | | 100% | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 30% | 70% | | | | | | 50% | | 50% | | | | | 50% | | 50% | | | | | 50% | | 50% | | | | | 50% | | 50% | | | | | | | | | | | | | | | | | | | |
| | | | | | | | 30% | 70% | | | | | | 30% | 70% | | | | | | 30% | 70% | | | | | | 30% | 70% | | | | | | | | | | | | | | | | | | | | |



VACANT POSITIONS

Salary increase and salary distributions planning functionality is generally the same for vacant positions as for filled positions. See the relevant sections above.

Planning for FTE, Term, and Wage/Salary Account

You can enter the planned term, FTE, and wage/salary E-level account for vacant positions in the blue boxes highlighted below. To enter an E-level account, **double-click** on the cell to pull up a list of account values from which to select.

Employee	Job Code Description	Job Code	Union Code	Term	FTE	Home Dept	Home Dept Name	Position Number	Status	Emp ID	Pay Group	Emp Rec	E-Level	Acct
Vacant Positions														
	Outreach Professional	3331	NU			50100	Continuing Ed - Administration	V00023261	Vacant				<Acct>	!
	Dean	0820	NU			50100	Continuing Ed - Administration	V003708	Vacant				<Acct>	!
	Dir CE Operations	1229	NU			50100	Continuing Ed - Administration	V009632	Vacant				<Acct>	!

- Do enter an E-level value when entering salary dollars in the vacant positions section. Otherwise, the Multi-Year Salary Report will reflect these salary dollars under the category missing D-level.

Deleting Vacant Positions

Filled positions cannot be removed from the plan file.

Vacant positions can be removed, however, by inactivating the position within HCM. Once inactivated in HCM, the position will no longer appear in Axiom MYSP after the next monthly refresh. Refer to HRS and Payroll for procedures for inactivating positions.

ADDITIONAL SALARY PLANS

Entering Additional Salary Plans

To enter additional salary plans, double-click on the red sentence shown in the bottom section of the plan file.

<div> Delete Additional Salary Plans </div> <div> << Double-Click to add New Positions, Pooled Positions, & Unallocated Salary Dollars >> </div>	
--	--

A new row will appear. All blue cells allow end-users to enter information:

Additional Salary Plans: Click the arrow to select from a dropdown list of additional salary plan types.

<div> Additional Pay New Positions Pooled Positions Unallocated Salary Dollars Wages Other </div>	<div> description; Enter text here > </div>	<div> Job </div>
---	--	------------------



Description: In column BH, enter free-form text to provide a more detailed description for this row. For example, if you had selected “Pooled Positions” in column BG, you might enter “PT NTT” in this field.

Job Code: double click in blue cell dropdown list of job codes appears.

Employee	Job Code Description	Job Code	Union Code	Term	FTE	Home Dept
Delete Additional Salary Plans						
<input type="checkbox"/>	< Description; Enter text here >	Job				<Dept>

Choose Value

Choose a value for Job.

<type here to filter values> Includes

- 0001 (TBC Approved Staff)
- 0002 (TBC Faculty)
- 0003 (President-Former)
- 0004 (Former Administrator)
- 0020 (Asst Dir for CIT Client Srv)
- 0022 (Chief/Director Police Srvs)
- 0040 (Associate Registrar)
- 0045 (Budget Operations Manager)
- 0050 (Custodian/Housekeeper)
- 0054 (Laboratory Animal Aide *)
- 0055 (Lab Animal Technologist *)

Showing 503 values

OK Cancel

Union Code: Click the arrow to select from a dropdown list of union codes or leave blank.

Employee	Job Code Description	Job Code	Union Code	Term	FTE	Home Dept
Delete Additional Salary Plans						
<input type="checkbox"/>	< Description; Enter text here >	Job				<Dept>

Term: Enter a numeric value 0 thru 12, or leave blank.

FTE: Enter a numeric value between 0.1 and 1.0 or leave blank.

Home Dept (required): Double-click in the cell and a pop-up will appear with available departments to select.

E-Level (required): Double-click in the cell and a pop-up will appear with available E-levels to select.



Saving Additional Salary Plans

After following the steps to add an additional salary plan, save the plan file. If you filtered the plan file upon opening using any of the Refresh Variables, your data will be saved but the additional salary plan rows may not display after saving, depending on whether or not the new values you entered match the Refresh Variables you selected. For example, if you opened the file to show only employees in a certain department, if you entered an additional salary plan row for another department, that row would not display after saving/refreshing because that department is not in the Refresh Variable applied to the plan file.

To view all Additional Salary Plans:

1. Refresh/open plan file without selecting any Refresh Variables; or
2. Refresh/open plan file selecting Refresh Variables that correspond to additional salary plan rows; or
3. Refresh/open plan file selecting only “New” in the Choose Position Section Refresh Variable. (See image below.)

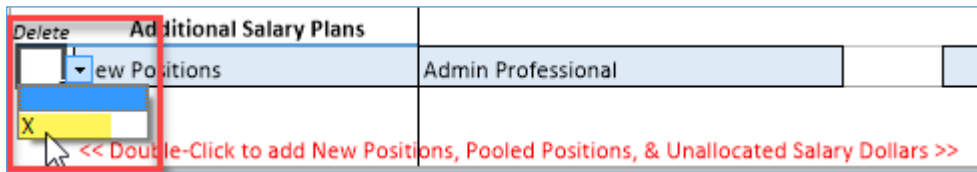
In addition, the MY Salary Planning (MYSP) Detail Report will show all Additional Salary Plan rows.

The screenshot shows a 'Refresh Variables' dialog box with a list of optional variables. The 'Choose Position Section' variable is expanded, showing a dropdown menu with three options: 'Filled', 'Vacant', and 'New'. The 'New' option is currently selected and highlighted by a mouse cursor. Other variables in the list include Position Title, Union Code, Term, FTE, Home Dept, Position Number, Pay Group, Employee Status, and Choose LastInitial Group.

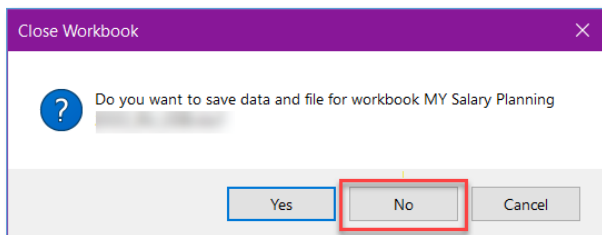
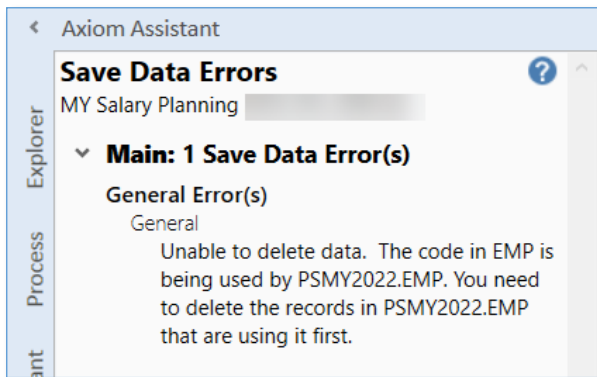
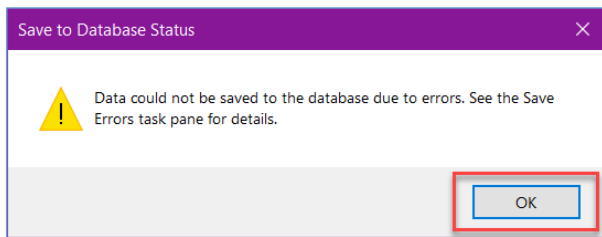


Deleting Additional Salary Plans

New positions, pooled positions, or other rows entered in the bottom Additional Salary Plans section may be deleted by selecting “X” from the Delete dropdown box in the leftmost column and then clicking “Save.”



After clicking “Save” you may see error message below. Click “Ok” and then close out of the plan file without saving. Upon reopening the plan file the desired row should no longer show. If the row is not able to delete from the plan file, change the salary amount to zero for desired row.





REFRESHING AND MAINTAINING POSITION & EMPLOYEE DATA

Monthly Refreshes

The plan files will be refreshed with the data from HCM each month. All future-year data will be retained and not overwritten. If a vacant position becomes filled, it will move up to the **Filled Positions** section and become populated with all job data relevant to the current employee, but retain all future-year planning inputs that had been entered for that position when it was vacant. Likewise, if a filled position is vacated, it will moved from the **Filled Positions** section down to the **Vacant Positions** section. The name of the previous incumbent will appear in parentheses, and all previously entered future-year planning data will be retained.

Creating and Reactivating Positions

Because MYSP position data is taken directly from HCM, it is important to ensure that your data in HCM is accurate and up to date. Positions will be created or reactivated as part of the hiring and/or recruitment process. The system used to communicate the need and the unit handling the position creation/reactivation depends on the type of employee, as shown in the table below.

Employee Type	Process	Resource for Units to Identify Existing Positions	How to Indicate New Position No. Needed	How to Indicate Position Reactivation Needed	Who Will Create or Reactivate Position
Full-time faculty	PeopleAdmin recruitment/waiver	UV_POSITION_INCUMBENT query	Action type = Recruitment/Waiver-New Position	Action type = Recruitment/Waiver-Existing Position	HR Faculty Services
Classified staff					HR Class & Comp
Graduate students	ePAR	Active positions will appear in ePAR search; inactive positions will not UV_POSITION_INCUMBENT query	Leave position # blank, note in comments that new position should be created	Note in comments that position needs to be reactivated	Payroll Services
Pre/Post-doc fellows					
Post-doc associates					
Part-time faculty	PeopleAdmin and/or ePAR per Guide to Salaried NTT Faculty on Payroll	UV_POSITION_INCUMBENT query	In PeopleAdmin, Action type = Recruitment/Waiver-New Position In ePAR, leave position # blank, note in comments that new position should be created	In PeopleAdmin, Action type = Recruitment/Waiver-Existing Position In ePAR, note in comments that position needs to be reactivated	HR Faculty Services
Unclassified staff	PeopleAdmin recruitment/waiver	UV_POSITION_INCUMBENT query	Action type = Recruitment/Waiver-New Position	Action type = Recruitment/Waiver-Existing Position	Provost's Office/HR Faculty Services
NPCs	PeopleAdmin and/or ePAR, depending on title	UV_POSITION_INCUMBENT query	In PeopleAdmin, Action type = Recruitment/Waiver-New Position In ePAR, leave position # blank, note in comments that new position should be created	In PeopleAdmin, Action type = Recruitment/Waiver-Existing Position In ePAR, note in comments that position needs to be reactivated	



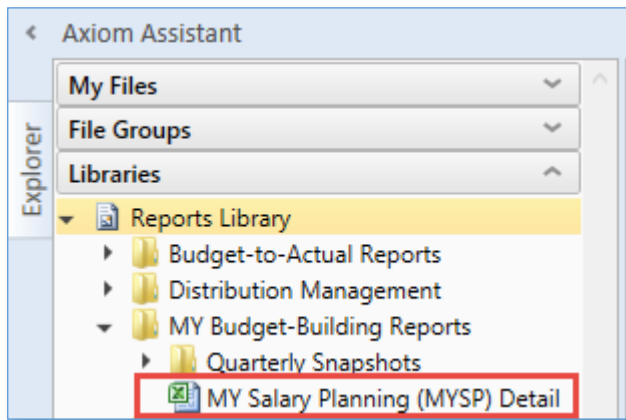
Inactivating Positions

Because MYSP position data is taken directly from HCM, it is important to ensure that your data in HCM is accurate, and any unnecessary vacant positions are inactivated. Units should plan to review and inactivate annually any vacant full-time faculty, staff, post-doctoral, and 12-month grad positions they don't plan to fill and no longer want to plan/budget for. Use the PeopleSoft HCM UV_POSITION_VACANT query to review all vacant positions within a department.



REPORT & QUARTERLY SNAPSHOTS

Report is located Axiom Reports Library / MY Budget-Building Reports folder: MY Salary Planning (MYSP) Detail.



MY Salary Planning (MYSP) Detail

The MY Salary Planning (MYSP) Detail report shows all planning data entered by position.

Click the “+” next to row 22 to see a summary report of planned expense by E-level. Filtering by any column value in the main section of the report will change the data displayed in the row 22 - 54 summary.

A		Home	MY Salary Planning (MYSP) Detail (R/O) x												
1		2		J		K		U	V	W	X	Y	Z	AA	
17		REPORT - MULTI YEAR SALARY PLANNING										Current YR Salaries			
18		Date>>											Current YR Salary 2023	Current YR Adjust 2023	
19		Reporting Unit >>										Salary			
20												Benefits			
21															
+		22						Faculty and Admin Salary		DFASL					
+		35						Staff Salary		DSTFS					
+		40						Grad Wages Other		DGWOT					
+		51						Undefined		Missing D-Level					
		53						Benefits*		DBENF					
+		54							FY23	FY24					



1	2	J	V	W	X	Y	Z	AA
17	REPORT - MULTI YEAR SALARY PLANNING						Current YR Salaries	
18	Date>>						Current YR Salary 2023	Current YR Adjust 2023
19	Reporting Unit >>							
20						Salary		
21						Benefits		
22		Faculty and Admin Salary				DFASL		
23		Instr Fac Tenr Trk				E5010		
24		Instr Fac NonTnr Trk				E5020		
25		Research Faculty				E5030		
26		Research Faculty				E5040		
27		Library Faculty				E5050		
28		Med Grp Inst Fac Tenr				E5060		
29		Med Grp Clin NT Fac				E5062		
30		Acad Admin - Chair				E5070		
31		Acad Admin - Non-Chair				E5071		
32		Officers of Admin				E5110		
33		All Other				Other		
34								

Colleges and Schools may choose to use the Report to prepare their annual staffing plan for the Provost's Office by taking a snapshot, saving a local copy, and filtering/highlighting positions of interest.

Quarterly Snapshots

A quarterly snapshot of the MY Salary Planning (MYSP) Detail report will be saved in the Axiom Reports Library > MY Budget-Building Reports > Quarterly Snapshots > RU folder in Aug, Oct, Jan, and March of each year. Units can use these snapshots for historical reference to look at prior versions of their multi-year salary plans.