

MULTI-YEAR SALARY PLANNING

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Need help? Please submit a Footprint





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 <u>vacant</u> 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

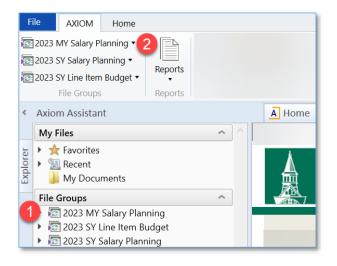
The following employee types are not included in Axiom multi-year salary planning:

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."

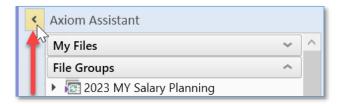
| A Open Plan Files | | | ? | \times |
|---|------------------------------|-----------------|----------|----------|
| Open Plan Files for 2 | 2023 MY Salary Planning | | | |
| <type filter="" here="" list="" to=""></type> |] | | | |
| Reporting_Unit_Code | Description 💌 | File Exists 🔽 L | ocked By | ^ |
| RU_ATHLETICS | RU Athletics | TRUE | | |
| RU_CALS | RU CALS | TRUE | | |
| RU_CAS | RU CAS | TRUE | | |
| RU_CEMS | RU CEMS | TRUE | | |
| RU_CESS | RU CESS | TRUE | | |
| RU_CIO | RU Chief Information Officer | TRUE | | |
| RU_CNHS | RU CNHS | TRUE | | |
| RU_COM | RU COM | TRUE | | |
| < | | | > | |
| | | ОК | Cance | el 🛛 |



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.

| Position Title (optional) | |
|-------------------------------|----------------------------------|
| Choose a value for Job. | Choose Value 🗙 |
| Union Code (optional) | |
| Choose a value for UN. | Choose Value 🗙 |
| Term (optional) | |
| Choose a value for Term. | Choose Value 🗙 |
| FTE (optional) | |
| Choose a value for FTE. | Choose Value 🗙 |
| Home Dept (optional) | |
| Choose a value for DEPT. | Choose Value 🗙 |
| Position Number (optional) | |
| Choose a value for Position. | Choose Value 🗙 |
| Pay Group (optional) | |
| Choose a value for PayGroup. | Choose Value 🗙 |
| Employee Status (optional) | |
| Choose a value for EmpStatus | Choose Value 🗙 |
| Choose LastInitial Group - su | uggested for large depts (option |
| | ~ 🗙 |
| Choose Position Section (op | tional) |
| | |

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 | т | Home Dept | Home Dept Name | Position Number | Status | Emp ID | Group | Emp Rec | E-Gevel | Act |
|---------|------------------------|---|--------------------------------|----------|---------------|------|-----|-----------|------------------------------|--------------------|--------|---------|-------|------------|-------------|------|
| 0 | and a second second | 0 | Spec Asst To President | 0806 | NU | 12 | 8.0 | 10300 | VP Legal Affrs & Gen Counsel | V00024494 | Active | 0064018 | SM1 | | 65110 | 5110 |
| | Californi, Salino J. | ~ | Administrative Counsel | 3001 | NU | 12 | 1.0 | 10300 | VP Legal Affrs & Gen Counsel | V003457 | Active | 0137171 | SM1 | | 65200 | 5200 |
| 1 | Pagella, Manufactor | 0 | Administrative Counsel | 3001 | NU | 12 | 1.0 | 10300 | VP Legal Affrs & Gen Counsel | V00021807 | Active | 0114155 | SM1 | 1 | 85200 | 5200 |
| c | Sum into S | 0 | Administrative Counsel | 3001 | NU | 12 | 1.0 | 10300 | VP Legal Affrs & Gen Counsel | V007334 | Active | 0103686 | SM1 | | 85200 | 5200 |
| | Vacant Positions | | | | | | | | | | | | | | | |
| | (Backda, Francisa) | | Vice Pres & Gen'l Counsel | 1430 | NU | | | 10300 | VP Legal Affrs & Gen Counsel | V003673 | Vacant | | | | <acc></acc> | |
| | (Brant,Marian K.) | | Office/Prgm Support Generalist | 2031 | NU | | | 10300 | VP Legal Affrs & Gen Counsel | V004833 | Vacant | | | | <aut></aut> | |
| | (Michael, Bancie U) | | Office/Progm Support Sr | 2041 | NU | | | 10300 | VP Legal Affrs & Gen Counsel | V004054 | Vacant | | | | -GADED | |
| - Carlo | Additional Salary Plan | | | | | | | | | | | | | | | _ |
| | New Positions | | fest | New | NU | | | 10300 | VP Legal Affrs & Gen Counsel | n.a. | Vacant | n.a. | n.a. | 0.8. | 85200 | |
| | Pooled Positions | | Re-Test | New | | | | 10300 | VP Legal Affrs & Gen Counsel | 6.0 | Vacant | 0.8 | 0.8. | 0.8. | 85061 | |

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.



| | , | Y18 | inc | rease | Per | ormance | | um (often in 1 w a promotion) | Pr | omotion | Re | esearch | Varia | ile - COM | Other | | F | 19 | FY2 | 0 | FY21 | | FY22 | 2 |
|---|-------------|------------------------|-----|-------|-----|---------|---|----------------------------------|----|---------|----|---------|-------|-----------|-------|-----------------------------------|-----------|------------|--------------|------------|-----------------------|------------|-----------------------|----------|
| Employee | CY Salary | FY18 CY Salary Adj. | ĸ | \$ | % | \$ | × | \$ | % | \$ | 8 | \$ | % | \$ | \$ | Save increases to SY Salary | Salary | % Increase | Salary | % Increase | Salary | % Increase | Salary | % inc |
| | \$502,611 | \$502,611 | | | | | | | | | | | | | | | \$502,611 | | \$502,611 | | \$502,611 | | \$502,611 | |
| Comparishe Contributions | 100.001.00 | | | | | | | | | | | | | | | No | 100.000 | | 1000.0001 | | - | | 100.000.00 | <u> </u> |
| Name do Name Prants | 100.000 | | | | | | | | | | | | | | | No | | | | | | | | - |
| fade in terms from the | 100,000,000 | | | | | | | | | | | | | | | No | 100.000 | | 100.000 | | 100.000.00 | | 10.00.0 | |
| Collection and | 100.000.000 | 100.000.00 | | | | | | | | | | | | | | No | 100.000 | | 100.000.0 | | 10.00 | | | |
| formation day 1 | 100.000.00 | ALC: NO. 1 | | | | | | | | | | | | | | No | | 10. | 100.000 | | - | | - | _ |
| inverse dant | 1 | 1.00.000.00 | | | | | | | | | | | | | | No | 1.00.000 | 11. I | 1.00.000.000 | | in the second second | | 1.00.000.00 | _ |
| Announce Annual And Connection 10 Annual Marchael | 100.000 | 100.000 B | | | | | | | | | | | | | | No | 100.000 | 10. | | 1. C | and the second second | | and the second second | _ |
| Contract Million High Print | 100,000,000 | 100.000.00 | | | | | | | | | | | | | | No | 100,000 | - | 100.000 | | - | | 100,000,00 | _ |

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

| The Universi | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|------|-----|------------|----------|------------|---------|---------------------|------|--------|-----------|--------|-----------------|------------|----------------------|------|-----|--------|------------|----------------|----------------------|----------|------|-----|---------|------------|---------------------|----------------|------------------|------|-----|---------|------------|------------------|-------------------|--------------------|-----|-----|--------|-------------|---------------------|------|
| | | | Fiscal Yea | 2018 501 | ery Distri | outions | | | Fiscal | Year 2011 | ADJUST | D Salary | Distributi | 0.05 | | | | Alscal Yes | or 2019 | | | | | Fi | col Year 2 | 1020 | | | | | , | iscal Year | 2021 | | | | | | Fiscal Year | 2022 | |
| Imployee | 100 | 150 | 300,330 | | | | ie k Other RU | | 150 | 300,33 | 305 | Gift/E 310-3 | nd Othe | r Other RU s Dept | 100 | 150 | 300.33 | 10 305 | Gin/I 310-3 | nd Other 71 Fued: | Other RU | 100 | 150 | 300,330 | 305 | Giff/End3 10-371 | Other Funds | Other RU Dept | 100 | 150 | 300,330 | 305 | Gitt/Er 10-37 | d3 Othe 1 Fund | r Otheri s Dept | 10 | 150 | 307,33 | 0 305 | Gitt/End3 10-371 | |
| | | | | | | | urrent year | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Reduke Prenting | | | | | | 1 | 100% | | | 1 | 1 | 1 | 1 | 100% | _ | 1 | 1 | 1 | | | 100% | | 1 | | | | | 100% | | | | 1 | | | 1005 | | | | 1 | 1 | 100% |
| Remains, Rates (no.). Californ, Johns 1 Pagellin, Jacobie 1. | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100 | ¥ | | | | |
| Californ, Jahre 1 | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | | | | 100 | ¥ | | | | |
| Pagella, Jacobie 1. | 100% | | | | | 1 | | 100% | | 1 | | | | | 109% | | | _ | | _ | | 100% | | | | | | | 100% | | | | | | | 100 | ¥ . | | | | |
| Read, Paulana, Resources | 100% | | | | | 1 | | 100% | | 1 | L | 1 | | | 100% | | | 1 | | | 1 | 100% | 1 | 1 | | | | | 100% | | 1 | <u> </u> | | | | 100 | ¥ [| | 1 | 1 1 | |
| Vecent Positions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| (Ringer, Junp 8.) | 100% | | | | | | | 100% | 1 | | 1 | | | | 100% | 1 | | | | | | 100% | 1 | | | | | | 100% | | | 1 | | | | 100 | ¥ | | | 1 | |
| Oviece Additional Salary Plans | | | | | | - | | _ | | | : | | - | | _ | ; | - | - | | | - | | : | | | | | | | | | | | | | _ | | | | | |

Note in the current fiscal year salary distributions associated with suspense (purpose 0010) for all funds are located in column "Other Funds".

| The Universit | | | | | | | |
|--|-------------|----------|-----------------|-----------|----------------|-------------|------------|
| | | | Fiscal Year | Sala | ary Distribut | ions | |
| | | | | | | Suspense | |
| | | | | | | Purpose | |
| | | | | | | 0010 & | |
| | | | | | Gift/End | Other | Other |
| Employee | 100 | 150 | 300,330 | 305 | 310-371 | Funds | RU Dept |
| | Suspense (P | urp 0010 |) for all funds | is locate | ed in "Other F | unds" in cu | rrent year |
| Strangers Millionaux and | 100% | | | | | | |
| | 80% | | | | 20% | | |
| termine the state of the | 100% | | | | | | |
| and a second | 100% | | | | | | |



Axiom Toolbar

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

| File AXIOM Home | | | | | | | | |
|--|--------------|---------------|--------------|----------------|-------------|-------------|-----------|-------------|
| 🖅 2023 MY Salary Planning | | H Save 🔹 | Refresh 🔹 | 🦉 Quick Filter | 🖶 Print 🔹 | 🚰 Show Home | 2 | X |
| E Archive 2023 SY Salary Planning | | I Change View | 🕶 🔍 Drill 🗸 | | Snapshot | Formula Bar | | Close Axiom |
| \overline Archive 2023 SY Line Item Budget | Reports • | → GoTo • | Freeze Panes | | 🖳 E-mail | Headings | Help • | Software |
| File Groups | Reports | | File Options | | File Output | Display | Help | Exit |

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:

| H S | ave 🔹 🕞 Refr | resh 🔹 |
|-------------------------|--------------------|--------|
| ЩС | hange View 👻 🏪 Add | Row(s) |
| Colu | mn Views | - |
| | Select All | ptions |
| | Deselect All | Hor |
| | All | |
| $\overline{\mathbf{A}}$ | Summary | |
| \checkmark | En oloyee Detail | |
| | New Year Salary | |
| | Outer Year Salary | |
| | Funding | |
| Shee | t Views | |
| цЦ | Default | |

"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.

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NEXT FISCAL YEAR SALARY INCREASES

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

To view and enter salary increases for the upcoming fiscal year, scroll to the right, or select **Change View > New Year Salary** from the Axiom ribbon. Positions will be displayed in alphabetical order by incumbent last name with blue salary component input fields.

Current Year Salary Adjustments

For filled positions, Axiom brings in the Current Year Salary once a month. For vacant positions, Axiom displays a \$0 Current Year Salary. Axiom allows you to <u>calculate a position's New Year salary increases based on a different</u> <u>Current Year Salary than the one imported into Axiom</u> by using the **FYXX CY Salary Adj.** field (column BX). Enter the salary you want the position or employee's New Year increase calculations to be based upon in the CY Salary Adj. column. Once this is complete, all NY increase components will be based on the adjusted current year salary.

Example 1: Joe's base salary is \$100,000. Joe is currently on sabbatical with his CY Salary temporarily reduced to \$77,300 (77.3%). Joe's NY salary increase needs to be calculated based on his regular salary of \$100,000, so his CY (Adjusted) Salary needs to be set to \$100,000.

Example 2: Sarah's term is changing from 12 mos to 9 mos effective 7/1. Her CY Salary of \$120,000 would be adjusted in Axiom (divide by 12, multiply by 9) to \$90,000 so that NY increases would be calculated on the \$90,000.

NOTE: Entering a Current Year (Adjusted) salary does not replace any ePAR actions or HRS paperwork.

New Year Salary Increases

New Year salary increases for the next fiscal year may be entered in the blue section shown below:

- 1. All NY increase components will be based on the <u>adjusted</u> current year salary.
- 2. As applicable, enter the percentage or dollar amount of any salary increase components in the appropriate column.
- 3. If you want the increase information you have entered in your MYSP file to feed into your Single-Year Salary Planning file (so your Single-Year Salary plan file will be pre-populated with the data you've entered in your MY Salary plan file), select "Yes" from the dropdown box in column CN, "Save increases to SY Salary." Inform FAB if you elect this option.
- 4. The New Year Salary and total % Increase will calculate automatically based on the data entered in the blue input cells.

| BG | BV BW | BX 3 | BZ | CA | CB | CC | CD | CE | CF | CG | СН | CI | CI | CK | CL | N CN D | СР | CQ |
|---------------|-------------|------------------------|-------|-----------|-------|---------|----|------------------|----|---------|----|------------|-------|-----------|-------|--|--------------|------------|
| The Universit | | | | | | | | um lotten in | 2 | | | | | | | | 4 | |
| | FI | /23 | Incre | ase (+/-) | Per | ormance | | n w a promotion) | Pr | omotion | R | esearch | Varia | ble - COM | Other | 1 | FY2 | 4 |
| Employee | CY Salary | FY23 CY Salary Adj. | × | \$ | % | \$ | % | \$ | % | \$ | % | \$ | % | \$ | \$ | 3 Save increases to SY Salary | Salary | % increase |
| | | \$19,234,068 | | | | | | | | | | \$1,500 | | | | | \$19,236,259 | 0.01% |
| Man Anna M | \$39,457.60 | \$39,457.60 | 1.50% | | 0.25% | | | | | | | \$1,500.00 | | | | No | \$41,648.1 | 1 5.55% |
| Manufact I | - | - | | | | | | | | | | | | | | Yes No No No | - | |

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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 | СР | CQ | CRCU | CV | CW C | CY CY | CZ D | A DB | DC D |
|--|--------------|-----------|------|--------------|------------|--------------|------------|--------------|------------|
| The Universit | | | | | | | | | |
| | FY2 | 4 | _ | FY25 | | FY26 | | FY27 | , |
| Employee | Salary | % Increas | e | Salary | % Increase | Salary | % Increase | Salary | % Increase |
| | \$19,234,068 | | | \$19,234,858 | 0.00% | \$19,235,662 | 0.00% | \$19,235,662 | |
| Water Streets and | | | - 1 | \$40,246.75 | 2.00. 2 | =CV60*1.02 | 3 2.00% | 4 | |
| International In | | | | | | - | | | |
| Approximation from the second | _ | | _ ! | | | | | | |
| dange bestern om | | | | | | | | | |
| The second second second | | | | | | | | | |

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.

SALARY DISTRIBUTIONS BY FUND

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

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

The current distributions (shown in white) are for the latest effective dated distribution for the current fiscal year period as of the monthly refresh from HCM (i.e., what you can expect the position's distribution to be on June 30). You can enter data to plan for how the position's salary will be distributed by fund. The first time you open the file, the future-year distributions will be populated with the same data as the current year distribution. The first

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save will save whatever data has been entered for the future-year distributions. HCM will refresh the files with the current year data (including the current year distribution) every month in the section in white.

Salary Distribution functionality:

- 1. Enter the planned distribution percentages for the relevant Fund in any of the future fiscal years, as appropriate.
- 2. If a red exclamation point (!) is displayed, this indicates that the salary distribution for a given fiscal year does not total 100% and needs to be corrected. The file will **not** save with this error.
- 3. If the planning data entered differs from one year to the next, the number for the outer-most year will appear in red text. This does not mean that there is an error; it is intended to call your attention to the change.
- 4. Use the "Other Fund" and "Other RU Dept" to plan for distributions to funds not shown in the columns or to departments outside your Reporting Unit.

| DE | | DF | DG | DH | DI | DJ | DK D | I DM | DN | DO | DP | DQ | DR | DS | DU FO | DV | DW | DX | DY | DZ | EA EE | E EC | ED | EE | EF | EG | EH | EI E | J EK | EL | EM | EN | EO | EP | EQ |
|---------|----|---------|------------|-------------|--------------|----------|------------------|------|----------|-------------|----------|---------------------|-----------|------------------|-------|-----|---------|-------------|---------------------|-------|------------------|------|-----|---------|------------|---------|----------------|------------------|------|-----|---------|-----------|---------------------|--------|------------------|
| | | Fis | cal Year | 2023 Sala | ry Distribut | tions | | | Fiscal 1 | (ear 2023) | ADJUSTED | Salary Dis | tribution | | | | FI | scal Year 2 | 024 | | | | | Fisc | al Year 20 | 25 | | | | | Fisa | al Year 2 | 026 | | |
| 100 | | 150 | 300,330 | | Gift/End | | Other RU Dept | 100 | 150 | 300,330 | | Gift/End 310-371 | | Other RU Dept | 100 | 150 | 300,330 | 305 | Gift/End 310-371 | | Other RU Dept | 100 | 150 | 300,330 | | | Other Funds | Other RU Dept | 100 | 150 | 300,330 | 305 | Gift/End 310-371 | | Other RU Dept |
| | | | | | in "Other Fu | | | 100 | 150 | 500,550 | 505 | 010 071 | Tuntos | Pept | 100 | 150 | 300,330 | 505 | 010 071 | Tunus | Dept | 100 | 150 | 300,350 | 505 | 010 0/1 | Tanas | o upr | 100 | 150 | 300,330 | 505 | 010 0/1 | 101100 | Dept |
| Juspens | | 1001071 | or an rome | 71310181110 | in outerro | 103 1100 | | | | | | | | | | | | | | | 100% | | | | | | | | | | | | | | |
| | - | | | | | | 100% | 100% | | - | | | | | | | _ | | | _ | 100/4 | - | | | | | | 100% | | | | | | | 100% |
| 11 | .% | | | | 57% | | 32% | | | 25% | | 25% | | 50% | | | 50% | | 25% | | 50% | 2 | | 25% | | 25% | | 50% | | | 25% | | 25% | | 50% |
| | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | ~ | | | | | 100% | | | | | | | 100% | |
| | | | 100% | | | | | | | 100% | - | | | | | | 100% | | | | | | | 100% | | | | | | | 100% | | | | |
| | | | | | | 100% | | 50% | | 50% | (3) | | | | 50% | | 50% | | | | | 50% | | 50% | | | | | 50% | | 50% | | | | |
| 30 | 44 | 70% | | | | | | 30% | 704/ | | - | | | | 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></acct> | 1 |
| | Dean | 0820 | NU | | | 50100 | Continuing Ed - Administration | V003708 | Vacant | | | | <acct></acct> | ! |
| | Dir CE Operations | 1229 | NU | | | 50100 | Continuing Ed - Administration | V009632 | Vacant | | | | <acct></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

<u>Filled positions</u> cannot be removed from the plan file.

<u>Vacant positions</u> 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

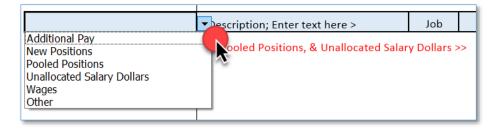
Entering Additional Salary Plans

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



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.

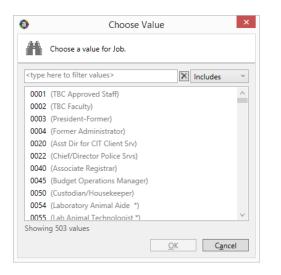




Description: In column BH, enter free-form text to provide a more detailed description for this row. For example, if you had selected "Pooled Positions" in column BG, you might enter "PT NTT" in this field.

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 | - | | | | | |
| | < Description; Enter text here > | Job | i | | | Required <dept></dept> |



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 | | | | | | |
| | | | | | | Required |
| | < Description; Enter text here > | Job | | - | | <dept></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 <u>(required)</u>: 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.

| | Refresh Varia | ables | |
|-------------------|---------------------|---------------------------|---|
| Position Title (o | ptional) | | , |
| Choose a value fo | or Job. | Choose Value 🗙 | |
| Union Code (opt | tional) | | |
| Choose a value fo | or UN. | Choose Value 🗙 | |
| Term (optional) | | | |
| Choose a value fo | or Term. | Choose Value 🗙 | |
| FTE (optional) | | | |
| Choose a value fo | or FTE. | Choose Value 🗙 | |
| Home Dept (opt | ional) | | |
| Choose a value fo | or DEPT. | Choose Value 🗙 | |
| Position Numbe | r (optional) | | |
| Choose a value fo | or Position. | Choose Value 🗙 | |
| Pay Group (optic | onal) | | |
| Choose a value fo | or PayGroup. | Choose Value 🗙 | |
| Employee Status | (optional) | | |
| Choose a value fo | or EmpStatus. | Choose Value 🗙 | |
| Choose LastIniti | al Group - suggeste | d for large depts (option | |
| | | ~ × | |
| Choose Position | Section (optional) | | |
| | | ~ × | 1 |
| Filled | | | |
| Vacant | N/Z | ancel | |
| New | | | |



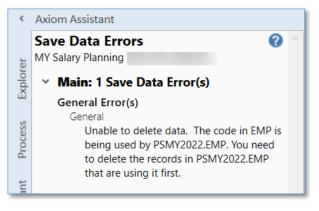
Deleting Additional Salary Plans

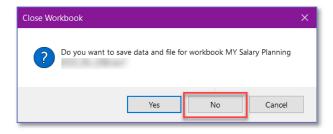
New positions, pooled positions, or other rows entered in the bottom Additional Salary Plans section may be deleted by selecting "X" from the Delete dropdown box in the leftmost column and then clicking "Save."

| Delete Ad | ditional Salary Plans | | | |
|--|----------------------------|--|-------------|---|
| ew Po | itions | Admin Professional | | |
| X X Z Z Z Z Z Z Z Z Z Z Z Z | le-Click to add New Positi | ons, Pooled Positions, & Unallocated Salar | y Dollars > | ~ |

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/ | UV_POSITION_INCUMBENT | Action type = Recruitment/Waiver-New | Action type = | HR Faculty Services |
| Classified staff | waiver | query | Position | Recruitment/Waiver- Existing Position | HR Class & Comp |
| Graduate students | | Active positions will appear | | | |
| Pre/Post- doc fellows | ePAR | in ePAR search; inactive positions will not UV POSITION INCUMBENT | Leave position # blank, note in comments that new position should be created | Note in comments that position needs to be reactivated | Payroll Services |
| Post-doc associates | | query | | | |
| | | 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 | |



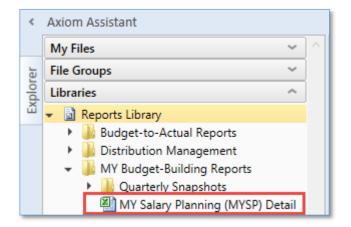
Inactivating Positions

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 | Hom | e 📄 MY Salary Plannin | g (MYSP) Detail (R/O) 🗙 | | | | | | | |
|-----|-----|---------------------------|-------------------------|-----------|----------|-----------|------|-----------------|---------------------------|------------------------|
| 1 2 | | J | K | U | V | W | Х | Y | Z | AA |
| | 17 | REPORT - MULTI YEAR SALAI | RY PLANNING | | | | | | Current | YR Salaries |
| | 18 | Date>> | | | | | | | Current YR Salary 2023 | Current YR Adjust 2023 |
| | 19 | Reporting Unit >> | | | | | | Salary | 100.000.000 | 100.000 |
| | 20 | | | | | | | Benefits | 80.000.000 | 10.000 |
| | 21 | | | | | | | | | |
| + | 22 | | | Faculty a | ind Admi | in Salary | | DFASL | | |
| + | 35 | | | | Sta | ff Salary | | DSTFS | | |
| + | 40 | | | G | rad Wag | es Other | | DGWOT | | |
| + | 51 | | | | Uı | ndefined | | Missing D-Level | | |
| | 53 | | | | В | enefits* | | DBENF | | |
| + | 54 | | | | | FY23 | FY24 | | | |



Axiom User Guide: MY Salary

| 1 2 | | J | | V | W | Х | Y | Z | AA | |
|-------|----|-------------------------------------|--------------------------|-------------|---------|---|----------|---------------------------|------------------------|--|
| | 17 | REPORT - MULTI YEAR SALARY PLANNING | LTI 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 o | and Admin | Salary | | DFASL | | | |
| 1 | 23 | | | Instr Fac T | enr Trk | | E5010 | | | |
| | 24 | | Ins | tr Fac Non | Tnr Trk | | E5020 | | | |
| | 25 | | | Research | Faculty | | E5030 | | | |
| - | 26 | | | Research | Faculty | | E5040 | | | |
| | 27 | | | Library | Faculty | | E5050 | | | |
| | 28 | | Med | Grp Inst F | ac Tenr | | E5060 | | | |
| | 29 | | Me | d Grp Clin | NT Fac | | E5062 | | | |
| - | 30 | | Ad | cad Admin | - Chair | | E5070 | | | |
| - | 31 | | Acad A | dmin - No | n-Chair | | E5071 | | | |
| - | 32 | | | Officers of | Admin | | E5110 | | | |
| - | 33 | | | Al | l 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.