Salary Increase Program Faculty Compensation Export Function

Contents

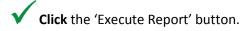## How to Use the Faculty Compensation Export Function

✓ **Login** to PennWorks with your PennKey and password

✓ **Confirm** that you have the 'Salary Increase Program Faculty Compensation Export' access role for the ORGs you require.
- Check the left navigation bar and make sure that you see the 'Faculty Compensation Export' link under the heading 'Salary Increase Program' then click the link.
- Check the Home School/Center and Home ORG fields and confirm that you can see only the ORGs in your approved ORG range.
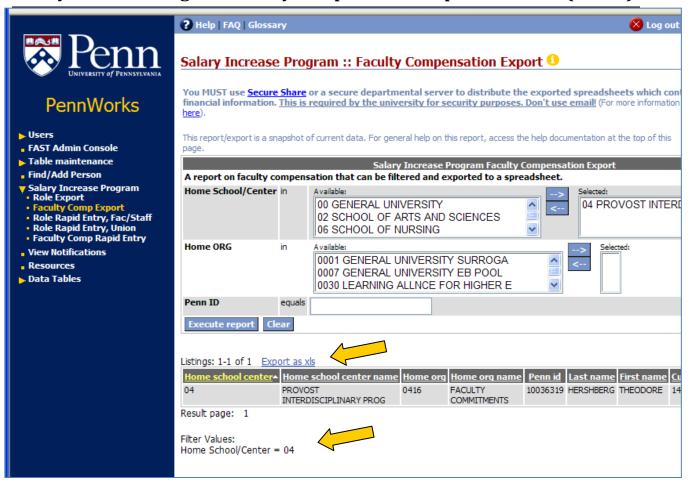

✓ **Download** everybody in your ORG(s) into an Excel spreadsheet and then 'slice and dice' the group into the usual smaller groups to hand to persons authorized to do the modeling

✓ **Click** the 'Execute Report' button.

✓ **Review** the results to confirm that you have the correct group.

✓ **Click** the 'Export as xls' link and save the resulting file. (see below for all of the columns/data included in the download since they are numerous)

Salary Increase Program Faculty Compensation Export Function (cont'd)

✓ **Copy and paste** the filters used for your report, which are visible on the screen BELOW the results.

✓ **Use** a secure method of sharing and transferring files, such as Secure Share, to distribute the exported spreadsheets which contain confidential financial information. This is required by the University for security purposes.

✓ Faculty Compensation components should be updated on the spreadsheet based on the coming FY commitment to the faculty member, in accordance with the practices outlined in pages 5-11 of Setting Up and Maintaining Faculty Records in PennWorks <http://www.finance.upenn.edu/ftd/documentation/Setting_Up_and_Maintaining_Faculty_Records.pdf>

Salary Increase Program Faculty Compensation Export Function (cont'd)

What is Salary Increase Program Faculty Compensation Export?

Faculty Compensation Export will allow Home ORG users to generate Excel spreadsheets to facilitate the collection of information about faculty compensation components. This function replaces the spreadsheets previously distributed by the Compensation Office of Human Resources at the beginning of the SALINC process in April. Designated School/Center Salary Increase coordinators can use this function to download current faculty compensation information for groups of faculty. NOTE: Users will only be able to export the ORG ranges specifically assigned to them in PennWorks. Key Features and Benefits of Salary Increase Program Faculty Compensation Export

- Immediate access to most current information and ability to export most current information at any time
- Flexibility in exporting spreadsheets (Schools may choose a single designee or allow individual BAs to export)

Filters/Parameters and Tips on Using Them

Filter Name	Description
Home School / Center	Displays only the school/centers based on the user's access.
Home ORG	Displays only the ORG(s) based on the user's access; if multiple ORGs, user can choose to export them individually.
Penn ID	Brings back a single record

Additional Faculty Compensation Export Tips

- Export will only contain information relating to "Faculty" who meet the below criteria:
  - Active employee or on leave
    - Employment_Status in ('A','L','P')) and
  - This employee has a current faculty role
    - Faculty Class in ('TEN','PRE','CLE','ACN','RES','CLN','ADJ','VIS','VEP','PRF','WIS') or
    - A Health System Clinician: Job Class in ('110193','110191','399125') or
    - Part Time HSC: Job Class = 399125 and a job with Job Grade = 'CPU'
- For multi-select, if you select an item, and then change your mind and de-select it (click on arrow pointing towards selection choices), you will find the de-selected item at the bottom of the scrolling list, NOT in the original order.
- Export will include updates made through the Rapid Entry screen for future periods.
- Role and Distribution data is not included on export.
- Projected states will display but will not be included in current total salary calculation
- To view all columns, scroll to the right of the screen
- To sort the export result table, select column heading
- Terminated employee roles will not be included

Columns/Data Included in Excel Download

PennWorks Excel Header Name	Details
Home School/Center	
Home/School Center name	
Home ORG	
Home ORG name	
Penn ID	
Last name	
First name	
Current total salary	Does not include projected states
New total salary	Does not include projected states
Current academic base	
New academic base	Blank if none has been entered for next year; populated if new base has been entered. Applies to standing faculty only.
% Academic base change	
Current faculty salary	
New faculty salary	Blank if none has been entered for next year; populated if new base has been entered. Applies to non-standing faculty.
% Faculty base change	
Current base salary supplement	
New base salary supplement	Blank if none has been entered for next year; populated if new base has been entered. Salary in excess of Academic Base or Faculty Salary that is guaranteed for a defined term.
% Base salary supplement change	
Current admin stipend	
New admin stipend	Blank if none has been entered for next year; populated if new base has been entered. Total salary paid for administrative appointments beyond regular teaching, research and service responsibilities.
% Admin stipend change	
Current staff salary	
New staff salary	Blank if none has been entered for next year; populated if new base has been entered. Salary that is normally paid for staff member duties, for those faculty who hold staff positions as their primary job
% Staff salary change	
Justification out of range	
Export date/time	Date/time in which export is run