

Salary Increase Program Role Rapid Entry Function

Contents

- How to Use the Role/Distribution Rapid Entry Function 2
- What is Salary Increase Program Role Rapid Entry (Fac/Staff & Union) Function?..... 7
- Key Features and Benefits of Salary Increase Program Role Rapid Entry Function..... 7
- Filters/Parameters and Tips on Using Them 8
- Role Rapid Entry Q & As..... 9
- Column Headings on Role Rapid Entry, Fac/Staff Results Table..... 10

Salary Increase Program Role Rapid Entry Function (cont'd)

How to Use the Role/Distribution Rapid Entry Function

NOTE: You will use this function to enter pay rates that have already been approved.

- ✓ **Login** to PennWorks with your PennKey and password
- ✓ **Confirm** that you have the 'Salary Increase Program Role Update' access for the ORGs you require.
 - Check the left navigation bar and make sure that you see the 'Role Rapid Entry, Fac/Staff' and 'Role Rapid Entry, Union' links under the heading 'Salary Increase Program' then click the appropriate link.
 - Check the Role School/Center and Role ORG fields and confirm that you can see only the ORGs in your approved ORG range. (below example has access to all)

The screenshot shows the PennWorks interface for the 'Salary Increase Program :: Role Rapid Entry, Fac/Staff :: Search' function. The left navigation bar includes a link for 'Role Rapid Entry, Fac/Staff'. The main content area displays search filters for 'Role School/Center' and 'Role ORG'. The 'Role School/Center' field shows a list of available options: '00 GENERAL UNIVERSITY', '02 SCHOOL OF ARTS AND SCIENCES', and '04 PROVOST INTERDISCIPLINARY PROG'. The 'Role ORG' field shows a list of available options: '0001 GENERAL UNIVERSITY SURROGA', '0007 GENERAL UNIVERSITY EB POOL', and '0030 LEARNING ALLNCE FOR HIGHER E'. Both fields have 'Selected' input boxes and navigation buttons. The 'Employee Group' field shows options like 'Exempt Salaried Staff (Monthly Paid)', 'Faculty (Monthly Paid)', and 'Non-exempt Hourly Staff (Weekly)'. A yellow arrow points to the 'Role Rapid Entry, Fac/Staff' link in the navigation bar, and a yellow box highlights the 'Role School/Center' and 'Role ORG' fields.

- ✓ **Search** for the records you need to update by using the available filters to more closely define the groups (see below for descriptions of filters and tips on using them)
 - Most filters allow you to make multiple selections.
 - You might want to filter into smaller groups that have similar update characteristics for example.
 - You might want to use the same filters that were used to create the excel spreadsheet (filter criteria that were saved by cut and paste)
 - Example below shows numerous filters in place.

Salary Increase Program Role Rapid Entry Function (cont'd)

Salary Increase Eligible Person*	Yes	▼
Salary Increase Eligible Role*	Yes	▼
Role School/Center	Available: 00 GENERAL UNIVERSITY 02 SCHOOL OF ARTS AND SCIENCES 06 SCHOOL OF NURSING	Selected: 04 PROVOST INTERDISCIPLINARY PROG
Role ORG	Available: 0001 GENERAL UNIVERSITY SURROGA 0007 GENERAL UNIVERSITY EB POOL 0030 LEARNING ALLNCE FOR HIGHER E	Selected: 0416 FACULTY COMMITMENTS
Employee Group	Available: Exempt Salaried Staff (Monthly Paid) Non-exempt Hourly Staff (Weekly) Non-exempt Salaried Staff (Weekly)	Selected: Faculty (Monthly Paid)
Faculty Class	Available: ACN Academic Clinician (Associated Faculty) ADJ Adjunct Faculty (Associated Faculty) CLE Clinician-Educator (Standing Faculty-CE)	Selected: TEN Tenure Track (Standing Faculty)
Job Grade	Available: 021 022 023	Selected:
Job Class	Available: 725 PENSION FUND 830000 838 PENSION FUND 825000 ACAD CLIN ASSOC PROF A 276017	Selected:
Employment Status	Available: On Leave With Pay On Leave Without Pay	Selected: Active
Current Annual Salary (From)	<input type="text"/>	
Current Annual Salary (To)	<input type="text"/>	
Penn ID	<input type="text"/>	
Browse Mode	<input type="checkbox"/>	
Results Per Page*	25 ▼	
	<input type="button" value="Clear"/>	<input type="button" value="Submit"/>

- ✓ **Filter** by salary range (optional)
 - For example, enter \$75,000 in 'Current Annual Salary (From)' field if you want only employees making \$75,000 or above. Enter \$60,000 in 'Current Annual Salary (To)' field if you want only employees making less than or equal to \$60,000.
- ✓ **Click 'Submit'** to view the group you have chosen and start to make updates on the 'Entry Mode' screen.

Salary Increase Program Role Rapid Entry Function (cont'd)

Salary Increase Program :: Role Rapid Entry, Fac/Staff :: Entry Mode ⓘ

Program: FY2011 Salary Increase (Faculty/Staff) 07/2010

Enter % as 2 for 2%, **NOT** .02. Enter \$ amount as 0.25 for 25 cents and 25 for 25 dollars.

ATTENTION: These processes are additive! If you enter '2%' and \$500, 2% will **FIRST** be calculated on the 'Current annual salary' and added to it for the 'New annual salary' and **THEN** \$500 will be added onto that result to give the 'New(est) annual salary'.

Apply % Change: Apply Annual Salary \$ Change: Apply Hourly Rate \$ Change:

Use these buttons to round any updated annual salaries to the nearest dollar. (Optional)

You have unsaved data on this page!

5 listings: 1-5 of 5

	Person		New Role Values				Current Role Values												
Sel	Name	Penn ID	Flags	% Change	Ann Sal	Pay Rate	End	OE	Just	Dists	Cha	SP	SR	ORG	Start	End	Job Class	Ann Sal	Pay Rate
<input checked="" type="checkbox"/>	MARTIN, STEVE	10009615		3.00	\$6,695,000	\$557,917		<input checked="" type="checkbox"/>	Edit	Edit	No	Yes	Yes	0417	09/01/2004		140010 PROGRAM DIRECTOR	\$6,500,000	\$541,667
<input checked="" type="checkbox"/>	MORRISON, TONI	10266011		3.00	\$46,350,000	\$3,862,500		<input checked="" type="checkbox"/>	Edit	Edit	No	Yes	Yes	0417	07/01/2009		120578 ASST DEVO OFFICER A	\$45,000,000	\$3,750,000
<input type="checkbox"/>	RAND, AYN	10178527						<input checked="" type="checkbox"/>	Edit	Edit	No	Yes	Yes	0417	07/15/2006		120388 DIRECTOR A	\$58,340,000	\$4,861,667
<input type="checkbox"/>	RAND, AYN	61970886						<input checked="" type="checkbox"/>	Edit	Edit	No	Yes	Yes	0417	07/01/2005		399115 COORDINATOR B	\$41,700,000	\$3,475,000
<input type="checkbox"/>	TAN, AMY	17152708						<input checked="" type="checkbox"/>	Edit	Edit	No	Yes	Yes	0417	07/02/2008		525625 ADMIN ASST B	\$30,100,000	\$578,846

Result page: 1

You have unsaved data on this page!

Group Statistics

Count 5

Current Annual Total \$181,640,000

New Annual Total \$181,640,000

Change in Annual Total \$0.000

Percent Change 0.00

Salary Increase Eligible Group Statistics

Count 5

Current Annual Total \$181,640,000

New Annual Total \$181,640,000

Change in Annual Total \$0.000

Estimated Percent Change* 0.00

*Actual % may be affected by HR actions. ⓘ

- 1** Enter a % and/or \$ change for a group (optional). The change may be applied in two ways:
- 'Apply to Selected' will only apply to those checked off in the select column
 - 'Apply to All Eligible' will apply the change to all rows displayed on the current page where the role is eligible for an increase. Non-eligible roles will not be updated.

Tips:

- Enter % as 2 for 2%, **NOT** .02. Enter \$ amount as 0.25 for 25 cents and 25 for 25 dollars.
- These processes are **ADDITIVE!** If you enter both '2%' and \$500, 2% will **FIRST** be calculated on the 'Current annual salary' and added to it for the 'New annual salary' and **THEN** \$500 will be added onto that result to give the 'new annual salary'.
- Note that updates are applied to the current page only, not the entire group.

Salary Increase Program Role Rapid Entry Function (cont'd)

② Use the checkboxes on the left to select specific rows on the page if you plan on applying the increases only to some of the records on the screen.

③ & ④ Check to make sure the % change and new annual salary or pay rate displayed for each row matches your salary spreadsheet. Make any adjustments necessary and the new values will recalculate. If you did not enter increases across a group in step 1, go row by row and enter the % increase or new amount as indicated on your spreadsheet

Tip:

- As a best practice, save the page often by clicking 'Submit Page' so as not to risk losing all your entries.

⑤ Round to the nearest dollar for all roles on the screen or just those selected. This is optional depending on your current business practices.

⑥ Click 'Edit' link under 'Just' (Justifications) if any of the increases are out of range; a pop up box appears.

- If you do not enter a justification for an out of range value, you will receive a validation error.
- If you select 'Other' from the justification list, you must enter descriptive text in 'Other Description'. If 'Other' is not selected, text will not be saved.
- Note that you can select multiple 'Justifications' and if you include 'Other,' you can also add text and save it.

Name	Penn ID	% Change	Ann Sal	Pay Rate	ORG	Job Class
GOODWIN, DORIS	61970886	1.00	\$42,117.000	\$3,509.750	0417	399115 COORDINATOR B

Justifications

Available:

- New hire
- Paid/Unpaid Leave
- Performance below expectations
- Promotion
- Terminated/resigned

Selected:

- Other

Other Description: Too many days off

Cancel Submit

⑦ Click 'Edit' link under 'Dist' (Distributions) in order to update the individual's distributions to match the new annual salary/pay rate. A pop up box appears.

- You will see distributions used this fiscal year and you will be able to copy them by checking the 'Copy' box and then clicking on the 'Copy Selected' button.
- The dates will default (each Salary Increase Program has dates associated with it for monthly and weekly paid employees). You may change the dates if needed.
- If you select one distribution to copy, the new amount or % will also default. If you select more than one distribution, you must enter the amount or %.
- The 'State' is set to 'Sal Prog' to indicate this distribution is in a holding area until Salary Increase Program updates are reviewed and processed.

Salary Increase Program Role Rapid Entry Function (cont'd)

Salary Increase Program :: Distributions

Name	Penn ID	% Change	Ann Sal	Pay Rate	ORG	Job Class
GOODWIN, DORIS	61970886	1.00	\$42,117.000	\$3,509.750	0417	399115 COORDINATOR B

Copy	Remove	State	CNAC	ORG*	B/C	FUND*	OBJ*	PGM*	CREF*	ERN*	Per Amt	Percent	Start*	Stop*	Delete	Disable
<input type="checkbox"/>		Sal Prog	040	0417	1	000000	5100	6503	0000	RMO			07/01/2010	06/30/2011	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		Final	040	0417	1	000000	5100	6503	0000	RMO	\$3,655.000		07/01/2009	06/30/2010		

8 Enter individual Faculty Compensation information directly from this screen.

- You will only see the Penn ID as a link if you have Faculty Comp access.
- Clicking on the individual's Penn ID link will take you directly to the Faculty Comp Rapid Entry page for that one individual so that you can update the record all at one time.
- Please see the Faculty Comp Rapid Entry instructions for this step.

Salary Increase Program :: Faculty Compensation


Result listings: 1-1 of 1

Person				New Fiscal Year: 2011									
Sel	Home ORCA	Name	Penn ID	New Academic Base	% Acad Base Change	New Faculty Salary	% Faculty Salary Change	New Base Salary Supplement	% Base Salary Suppl. Change	New Admin Stipend	% Admin Stipend Change	New Staff Salary	% Staff Salary Char
<input type="checkbox"/>		MARTIN, STEVE	10009615										

Result page: 1

Review the Group Statistics boxes at the bottom of the screen (Fac/Staff only; this is not displayed for Union).

- This will only display accurately after performing the 'Submit Page' (Step 3 & Step 10)
- If you included both eligible and non-eligible employees in your search, these two boxes will show different summary results.
- With the Salary Increase Eligible Group Statistics you can keep track of how closely you are adhering to University target pool percentages. However, note that the actual percentage may be affected by other HR actions in PennWorks.

<p>Group Statistics</p> <p>Count 5</p> <p>Current Annual Total \$181,640.000</p> <p>New Annual Total \$183,521.400</p> <p>Change in Annual Total \$1,881.400</p> <p>Percent Change 1.04</p>	<p>Salary Increase Eligible Group Statistics</p> <p>Count 5</p> <p>Current Annual Total \$181,640.000</p> <p>New Annual Total \$183,521.400</p> <p>Change in Annual Total \$1,881.400</p> <p>Estimated Percent Change* 1.04</p>
<p>*Actual % may be affected by HR actions. </p>	

Salary Increase Program Role Rapid Entry Function (cont'd)

10 Click the 'Submit Page' button.

- NOTE: If you have not yet updated these people's distributions, you will receive validation warnings that you must do that. You can either 'Submit Anyway' and come back later to add/correct the distributions or you can do it all at the same time.
- Next/previous page selection: If you haven't saved (clicked 'Submit Page' button), a warning pop up will remind you to save the page before leaving it in order to not lose any changes that you've made. Cancel button is included on the pop up in case the user doesn't want to save.

Tip:

- Save often by clicking the 'Submit Page' button, especially when moving from page to page or entering numerous changes.
-

What is Salary Increase Program Role Rapid Entry (Fac/Staff & Union) Function?

Role Rapid Entry will allow users to update pay information and distributions for a group of employees. This function replaces one-at-a-time updating of records in the previous SALINC system. School/Center Salary Increase coordinators who are responsible for updating pay and distribution information within a person's role organization will use this function in PennWorks, as well as coordinators who are responsible for other pay updates for a large group, such as a bargaining unit. Updates may be made to both Salary Increase-eligible and non-Salary Increase-eligible employees' roles. NOTE: Users will only be able to export the ORG ranges specifically assigned to them.

Key Features and Benefits of Salary Increase Program Role Rapid Entry Function

The anticipated key features and benefits of the Role Rapid Entry functions include:

- Ability to review and modify staff and faculty records from the user's Internet browser rather than the current, less intuitive mainframe application
- Flexible filtering options for users to export or update a specific population, including employee group (monthly/weekly), job grade, job class, faculty class, eligibility status, current salary, or members of a bargaining unit
- Multiple updating of salary and distribution information for groups of employees, rather than the one-at-a-time process of the previous SALINC system
- Ability to apply the same percent or amount increase across an entire group or a set of selected records
- Ability to update batches/groups of employees (e.g., bargaining units) on scheduled dates other than July 1

Salary Increase Program Role Rapid Entry Function (cont'd)

Filters/Parameters and Tips on Using Them

Name	Description	Included on Fac/Staff / Union screen
Program	Retrieves one or more bargaining units' members, whose pay rates are to be updated on the date indicated	Union
Salary Increase Eligible Person	See detail criteria for eligibility in PW Glossary REQUIRED: Y/N/Both	Fac/Staff
Salary Increase Eligible Role	--See detail criteria for eligibility in PW Glossary --Note that some eligible persons have roles that are not eligible. For example, a faculty member may have a Summer Research or Lecturer B role. Select "Both" if you have a need to update distributions or pay rates for any non-eligible roles. --REQUIRED: Y/N/Both	Fac/Staff
ole School/Center	Displays only the school/center(s) based on user's access. In most cases – only 1 role school/center applies	Both
Role ORG	Displays only the ORG(s) based on user's access.	Both
Employee Group	Internally <u>in the past</u> referred to as "A1-A4"	Both
Faculty Class		Fac/Staff
Job Grade		Both
Job Class		Both
Employment Status	Includes active employees, those on leave with pay and on leave without pay. Note those on leave with pay are now included as Salary Increase Eligible. Terminated employees may not be updated via Role Rapid Entry.	Both
Current Annual Salary (From)	The lowest value of the role annual salary. For example, if you want only employees making \$75,000 or above, enter 75,000 in this field.	Fac/Staff
Current Annual Salary (To)	The highest value of the role annual salary. . For example, if you want only employees making less than \$60,000, enter 60,000 in this field.	Fac/Staff
Hourly Rate (From)	The minimum, inclusive, hourly rate for Union employees	Union
Hourly Rate (To)	The maximum, inclusive, hourly rate for Union employees	Union
Penn ID	Allows choice of individuals for single changes	Both
Browse Mode	Click to ensure browsing with no unintended changes	Both
Results Per Page	User preference for 25, 50, 100 records per screen	Both

Salary Increase Program Role Rapid Entry Function (cont'd)

Role Rapid Entry Q & A's

Q: I selected an item in the multi-select and then changed my mind and de-selected it but I can't find it any more in the 'Available' list. Does this mean I can't really de-select items?

A: You are able to de-select items but you will find the de-selected item at the bottom of the scrolling list, NOT in the original order.

Q: Where can I find current salary information on the screen?

A: To view all columns, including current salary information, you must scroll to the right of the screen. Generally, un-editable information is in the right-most columns so that data needing edits falls in the middle of your screen for easy access.

Q: How do I sort the results so I can enter my data more efficiently?

A: To sort the result table, identify the column heading for the information that you want to view together and then click on the heading.

Q: When will the data that I enter be added to the data warehouse?

A: Data will be sent nightly to warehouse. A comprehensive view of the changes made to your rapid entry screens can then be seen daily through data warehouse reporting.

Q: How do I review what others entered without unintentionally changing anything?

A: If you have both inquiry and update access, you can indicate that you want to enter the page in browse mode. This allows you to page around without triggering a save. Another option would be to run a data warehouse report.

Q: How do I enter a reclassification or promotion during the Salary Increase cycle?

A: The job class field cannot be updated through the Salary Increase screens. Other PennWorks screens must be used if an update (e.g. Promotion during the Salary Increase cycle) is required. Go to 'Find/Add Person' in the left navigation bar and then proceed with the Roles/Distributions tab and tasks with the identified person.

Q: Why was I prompted to enter a role end date?

A: If a role expires prior to or during the upcoming year, you may enter a revised role end date to extend the role. You may not save a salary increase until you have indicated the role extends at least partially into the upcoming year.

Q: How do I indicate that an employee is not receiving an increase?

A: If no increase is planned for an employee, enter 0 in the '% Change' column; for FY11 Fac/Staff, you must enter a justification for eligible employees receiving 0%.

Salary Increase Program Role Rapid Entry Function (cont'd)

Column Headings on Role Rapid Entry, Fac/Staff Results Table

Heading	Description
Sel	Checkboxes for selecting individual records
Name	The full name (last, first) of the employee.
Penn ID	The Penn ID of the employee who holds the role.
Flags	Whether Salary Increase values have been stored for this role in this batch. Mouseover flag for more information. Tip: Sorting on this column will group together all records that have not yet been updated for this Salary Increase Program.
% Change	The percent increase that is to be applied to the annual salary and/or pay period amount for this role.
Ann Sal	The new annual salary for the role as a result of applying the Salary Increase.
Pay Rate	The new pay period amount for the role as a result of applying the Salary Increase.
End	The new end date of the role as a result of applying the Salary Increase, if not open ended.
OE	Use this column to indicate the role is now open-ended (no end date).
Just	Links to dialog box to list justifications for out-of-range increases.
Dists	Links to add the individual's distributions for the upcoming period.
Cha	Whether the role has changed since the user last saved Salary Increase data ('Cha' is different on the entry page than on the export)
SP	Whether the employee for the role is eligible for the Salary Increase process.
SR	Whether the role is eligible for the Salary Increase process.
ORG	The ORG that this role is under. Mouseover ORG code for description.
Start	The start date of the term for which the person holds the role.
End	The current end date of the term for which the person holds the role.
Job Class	Job class code and title.
Ann Sal	The annual salary for the job appointment. A value is only present for applicable job appointments.
Pay Rate	The pay rate for the employee for the job. Depending on the employee type, the pay rate will be a pay period amount or hourly rate.