2018-2019 Salary Review Process

Procedure Examples and Instructions

These examples provide explanations and instructions for entering salary increases. Screenshots are displayed that demonstrate how to use the SAP Salary Review transaction.
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Before starting the Transaction:

- Know your Personnel Assignment number. Employees have been grouped under the managers (i.e. department heads) to whom they report. To access the Salary Review entry screen for your employees, you will enter your Personnel Assignment number when directed.

Reviews by Deans and Assistant/Associate Vice Presidents:
- See page 21

Reviews and Approvals by Vice Presidents:
- See page 23
Login Instructions

1. Logon to the SAP system, preferably using SAP GUI.
2. At the SAP Easy Access screen enter transaction **ZSALREV**
3. Click the Enter button.
4. The Texas State Salary Review page will show up.

5. In the **Primary Manager** section, enter the **Personnel Number** of the manager responsible for entering salary review information.

   *Example: 3078*

   *Do not change the Validity dates or Effective Date.*

   *The “Finalize list on save” box (☐ Finalize list on save) is reserved for the President and Vice Presidents to indicate final approval of the increases entered for the employees assigned to an individual manager. Once this box is checked, the system will not allow any additional entries/changes for these employees.*

6. Click the Execute button.
7. This screen will show up

<table>
<thead>
<tr>
<th>TaskID</th>
<th>Owner</th>
<th>Name</th>
<th>Position</th>
<th>Reason</th>
<th>PayEnr</th>
<th>DollarEnr</th>
<th>NumWork</th>
<th>CurrPayMonth</th>
<th>ProposedMonth</th>
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</thead>
<tbody>
<tr>
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<td>00830974</td>
<td>Anderson, Arnold</td>
<td>Survey Supv</td>
<td>Of Staff</td>
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* Denotes possible basic pay change after last raise
Description of Terms

- **Allocated Fund** – The specific funding source for employee salaries.
  - Method Funds are those accounts funded by appropriations, tuition, or designated tuition.
  - Other funds displayed are income generating or fee based and exclude grants and gift funds.
- **Original allocated amount** – Displays the amount allocated to the manager for Staff merit increases. This amount will fund increases for employees whose cost distribution reflects full or partial funding from the identified fund(s).
- **Amount remaining for distribution** – The amount will decrease as increases are entered.
- **Name column** – Employees are listed alphabetically. Although six lines are listed for each employee (allowing for six types of increase), one line will be used for Staff in the 2018-2019 salary review process.
- **TxStID column** – Lists the Person ID number of each employee.
- **Pernr column** – Lists the Personnel Assignment number of each employee.
- **Position column** – Abbreviations of position titles are listed.
- **Reason column** – Lists the types of increases available.
- **PctIncr column** – Used to enter increases by percentage amount (i.e., 2.00%).
- **DollarIncr column** – Used to enter increases by dollar amount per month (i.e., $25.50).
- **NumMoWork column** – 12 months is displayed for each employee. **Modify this number if necessary**, to correctly display the number of months to be budgeted for an employee. The number in this column is used to calculate the total cost of any increase entered in the PctIncr or DollarIncr columns.
- **CurrPayMonth column** – Displays the employee’s monthly salary as of October 1, 2018 before any increases are added. It does not include State Longevity and Hazardous Duty Pay.
- **ProposedMonth column** – Displays the employee’s revised monthly salary as increases are given.
- **Update list button** (upper left of screen) – Clicking this button after entering one or more increases updates the Amount remaining for distribution.
Example of entering a 3% merit increase

8. Select one Staff employee and enter a merit increase on the 01 Staff Merit line. (01 Staff Merit is displayed in the Reason column.)

Example: Arnold Anderson is a 12-month employee and is to receive a 3% merit increase. On Arnold’s 01 Staff Merit line, find the 0.00 in the PctIncr column. Change it to 3.00.

9. Click the Update list button (         ) in the upper left part of the screen.

Note: Click Update list button after entering each employee’s increase.

• If several employees’ increases are entered before this button is clicked, and the sum of the increases exceeds one or more of the Amount remaining for distribution figures, it may be difficult to determine which employee’s increase caused the amount(s) to be exceeded.
Notes:

- Percentage increases are calculated using the salary displayed in the `CurrPayMonth` column. Arnold’s monthly salary before the merit increase was $3,622.49.
- The dollar value of the 3% merit increase is displayed as $108.67 per month ($3,622.49 X 3% = $108.67).
- A $108.67 per month merit increase for 12 months’ costs $1,304.04 per year.
  o Since Arnold’s cost distribution reflects 100% Method funding, the `Amount remaining for distribution` has been reduced by $1,304.04.
  o Had the cost distribution been less than 100% Method funded, the `Amount remaining for distribution` would have been reduced by a proportionate amount.
    - For example, if the funding was split 75% Method and 25% 3002001006, the `Amount remaining for distribution` for each fund would be reduced as follows: Method by $978.03 ($1,304.04 X 75%) and 3002001006 by $326.01 ($1,304 X 25%).
Checking an employee’s cost distribution

11. To check the cost distribution for an employee, double click the employee’s name.

*Example:* Double clicking Arnold Anderson’s name provides the following display, which indicates that 100% of his 3% ($108.67 /month) merit increase will be charged to the Fund listed.

Note: Click on the Back button ( ) to return to the salary review screen.
Changing a previously entered increase

12. Making changes to increases after the Update list button (Update list) has been clicked:
   a. Once a percentage increase has been entered and the Update list button has been clicked, the dollar value of the percentage increase is displayed in the DollarIncr column. **Be aware** that the system will **not** allow you to change and update the figure in the DollarIncr column.
      • To change the amount of the percentage increase, go to the PctIncr column, change the percentage, and click the **Update list** button. The amount in the DollarIncr column will change automatically.
      • To change the increase from a percentage-based increase to a dollar-based increase, you must first change the amount in the PctIncr column to 0.00 and click the **Update list** button. Then you can enter an amount in the DollarIncr column and click the **Update list** button.
   b. To increase or decrease a dollar increase entered in the DollarIncr column, enter the new dollar amount and click the Update list button.
   c. To change a dollar increase entered in the DollarIncr column to a percentage increase, enter the percentage in the PctIncr column and click the Update list button.
Example of an employee not eligible for merit based on date hired

13. Employees hired after September 5, 2017, are not eligible for merit increases. While these employees will be displayed, no increase can be entered in either the PctIncr column or the DollarIncr column.

Example: Bonnie Ashton was hired on September 11, 2017. She is not eligible for a merit increase.

Note: In the Reason column for Ashton, the 01 Staff Merit option is not displayed.
14. Select the next Staff employee to receive a merit increase and enter the increase on the 01 Staff Merit line.

Example: John Berry is a 9-month employee and is to receive a $50 per month merit increase. On John’s 01 Staff Merit line find the 0.00 in the DollarIncr column. Change it to 50.00. In the NumMoWork column change the 12 to 9.

15. Click the Update list button (Update list).

16. Note:
   a. John’s cost distribution reflects fund 3002001006.
   b. A $50 per month increase for 9 months costs $450 per year.
   c. From an Original allocated amount of $1,170, the Amount remaining for distribution from this fund has been reduced to $720 ($1,170 – 450 = $720).

Example of entering a $50/month merit increase and changing the number of months worked from 12 to 9
17. Select the next Staff employee to receive a merit increase and enter the increase on the 01 Staff Merit line.

Example: Jake Compton is a 12-month employee and is to receive a 6% merit increase. On Jake’s 01 Staff Merit line find the 0.00 in the PctIncr column. Change it to 6.00.

18. Click the Update list button (        ).
19. Note:

a. The dollar value of a 6% increase would be $273.35 per month ($4555.86 X 6%).

b. A $273.35 per month increase for 12 months would cost $3,280.20 per year ($273.35 X 12).

c. Jake’s cost distribution is attached to fund 2000011006, which is considered Method. The Amount remaining for distribution from Method Funds is $2,802.96.

d. Since the 12-month cost of Jake’s 6% merit increase ($3,280.20) exceeds the Amount remaining for distribution ($2,802.96), the entry will not be accepted for update. An Information box is displayed, indicating that the Method allocation has been exceeded.

20. Click the Continue (Enter) button on the information box.
21. Note:

a. An “Allocation over expended” (Allocation over expended) error message is displayed at the bottom left of the screen.

b. With an Amount remaining for distribution of $2,802.96, either Jake’s increase must be reduced, or one or more increases entered for other Method-funded employees must be reduced.

22. Reduce Jake’s increase to 5%.

23. Click the Update list button (Update list).  

24. Note:

a. Jake’s increase has been accepted and the Amount remaining for distribution reduced to $69.48.

b. Additional entries or changes to Method-funded employees may be made in order to allocate the remaining $69.48.
25. Continue entering increases. When all increases and changes have been entered, click the Save button ( ).

Remember to click the Save button ( ) prior to leaving the transaction or all entries made since the last Save action will be lost.
27. A “Records saved” message ( Records saved ) appears at the bottom of the screen and the salary review transaction is complete.

Note: Further entries and changes may be made after saving the transaction.

⚠️ Once again, remember to click the Save button ( ) prior to leaving the transaction or all entries made since the last Save action will be lost.

The transaction is complete.

If you desire to print a copy of the salary review entries, follow the instructions on the next two pages.
Printing a copy of the salary review entries

28. Click **Menu** in the upper left corner of the screen.

29. A dropdown box of options will appear:

30. Place your cursor on **System**, then **List**, and an additional box of options will appear.

31. Click **Print Ctrl+P**
32. A Print Screen List box will appear:

33. Verify/enter the name of the Output Device (i.e., printer).

34. Click the Continue (Enter) button ( ) on the information box.

Printing is complete.
Reviews by Deans and Assistant/Associate Vice Presidents

1. You will need the Personnel Assignment number of each of your direct reports. To review the entries made by your managers for their employees, use the transaction described on slides 3-18 above.

To display the entries made by a particular manager, enter that manager’s Personnel Assignment number on the initial Texas State Salary Review:
2. You may change the Staff Merit amounts entered by each of your managers. Remember, however, that any changes you enter for a Method-funded employee will be limited by the remaining merit pool allocation for that group of employees. The system will not allow you to overspend the original allocated amount for that group.

3. If you change any of the entries made by a manager, remember to click the Update List button (Update List) to implement your changes. Then save your entries by clicking the Save button (Save) before you close the transaction.

4. Notify your Vice President when you have completed reviews of the entries made by your direct reports.
Reviews and Approvals by Vice Presidents

1. You will need the Personnel Assignment number of each manager in your division who made Salary Review entries. To review the entries made by your managers for their employees, use the transaction described on slides 3-18 above.

To display the entries made by a particular manager, enter that manager’s Personnel Assignment number on the initial Texas State Salary Review:

2. You may change the Staff Merit amounts entered by each of your managers. Remember, however, that any changes you enter for a Method-funded employee will be limited by the remaining merit pool allocation for that group of employees. The system will not allow you to overspend the original allocated amount for that group.
3. If you change any of the entries made by a manager, remember to click the Update List button (Update list) to implement your changes. Then save your entries by clicking the Save button (Save) before you close the transaction.

4. Final Approval of a Manager’s List. To indicate your final approval of a manager’s list and prevent any further changes/entries for the employees assigned to the manager, use the Back button (Back) to return to the initial Texas State Salary Review screen. Verify that the manager’s Personnel Number is displayed in the Primary Manager section:

5. Click on the Finalize list on save box (Finalize list on save).

6. A checkmark will appear, confirming that this manager’s list has been locked:

7. Click the Execute button (Execute).

8. Click the Save button (Save).

9. Enter another manager’s Personnel Number to initiate review of entries or close the transaction.

The review and approval process is complete.
Contacts

Merit pools or other budgetary issues:
Budget Office | 5.2376 | budget@txstate.edu

Salary Review Questions:
Katie Bonner or Teresa Duggins | 5.2557 | hr_mdc@txstate.edu