

## WORKSHEET INSTRUCTIONS FOR FACULTY SALARY INCREASES FY 2017-18

The information and instructions below are provided to assist you in completing the worksheet process. If you have questions, please do not hesitate to contact your Business Center Human Resources Partnership Managers or the Human Resources individuals listed at the end of this document.

Before proceeding, we ask that you review the November 20, 2017 memo from Susan Capalbo, Senior Vice Provost for Academic Affairs, and Donna Chastain, Director and Interim CHRO, Office of Human Resources. It contains important information that will assist you in completing this process successfully. The memo can be found on the Office of Human Resources website at <http://hr.oregonstate.edu/>.

**Eligibility:** The worksheets should reflect all employees in the TS Org or group hired into their *current* position prior to January 1, 2017 whose appointment was 0.50 FTE or greater as of November 17, 2017. Review the worksheets to ensure that all eligible faculty members employed in the designated Time Sheet (TS) Org, or special grouping, have been included and the listed information is correct. Although most employees are listed in their respective Time Sheet (TS) Org, some organizations have requested to group employees by reporting lines or to cluster several TS Orgs together on one worksheet. These groups and clusters have been previously identified and requested by your Business Center Human Resources Partnership Manager. If you have questions, please see your Business Center Human Resources Partnership Manager. The attached worksheet(s) reflect employee salary data as of November 17, 2017.

**Funding:** The funding for the increases, reflected on the attached worksheet(s), will be provided by central administration for eligible positions supported by most Education and General (E&G) funds.

It is the responsibility of the recommending department/unit to identify and cover funding for positions supported by Statewide Public Services (SWPS), grants, contracts, gifts, auxiliary revenue and other funds from existing budget.

### **Completing the Worksheet**

**Completed By:** At the top left-hand corner of the worksheet; please enter the name of the individual completing the worksheet and his/her extension number.

**Column K – Annual Full-time Salary Rate as of November 17, 2017:** Review data in Column K to ensure it reflects the employee's current annualized salary rate. The annualized salary rate represents the employee's salary rate on a full-time (1.0 FTE) basis. If the employee is appointed at less than 1.0 FTE, the fully satisfactory increase he/she receives will automatically be pro-rated in Banner based on their current FTE. If you believe the salary information listed for an employee is incorrect, you may correct the worksheet by inputting the correct amount in Column K.

**Column L – Last Review Date:** Date of Banner record for the last Performance Evaluation.

**Column M – No Increase Reason Code – Data Entry Options:** You must place one of the following codes in Column L if you are **not** recommending a fully satisfactory increase for an employee.

Code A – Employee will not receive a fully satisfactory increase

Code B – Employee has or will be terminating/retiring prior to the effective date of the salary increase

Code C - Employee is located in another department/unit

Code D – Funding source does not provide for an increase

Column N – Proposed Fully Satisfactory Percentage Increase: Insert the desired merit increase between a minimum of 1.8% and a maximum of 6%.

Column O – Raw Annualized Dollar Amount of Fully Satisfactory Increase: Column N automatically calculates the annual dollar amount of the increase based on the percentage input in column N. Please remember that this is an annualized amount based on 1.0 FTE. Banner will pro-rate this amount if the employee's appointment is less than 1.0 FTE.

Columns P – Total Percent Increase, Adjusted to be Divisible by 9 or 12 Months: Column P takes the value of Column N and adjusts it to produce a total percentage increase that creates a dollar amount that is divisible by 9 or 12 months, based on the employee's appointment basis (Column J).

Column Q – Estimated Annualized Dollar Amount of Total Increase, Adjusted to be Divisible by 9 or 12: Column Q reflects the amount in Column O, adjusted to be divisible by 9 or 12 months (Column J). This is an estimated amount and may differ slightly from the final amount reflected in the employee's paycheck due to rounding for Banner requirements. In most instances, there is no difference between this amount and the amount reflected in the paycheck.

Column R – Estimated Annual Salary Rate in Jan/Feb, Rounded up and Divisible by 9 or 12 Months: Column R is the result of adding Column Q to Column K to reflect the employee's new annualized salary rate, effective either January 1, 2018 (for 12-month employees), or February 1, 2018 (for 9-month employees).

Column S – Department Remarks: Please use this column to indicate terminations, tenured placeholder positions (enter "TP" only), and other information useful in defining any conditions that affect your decision.

Columns T and U - Department Use Only: The *Department Use Only* section (Columns T and U) has been added to the worksheets, at the request of several key representatives, as a tool to assist in budgeting and ensuring fiscal controls. Please be aware that these columns do not have an impact on other worksheet calculations, nor will OHR or Payroll utilize this information in administering the faculty salary increases for FY 2016-17. You may elect to use or not use this section of the worksheet.

Columns T and U include an employee's current appointment FTE (%) as of November 17, 2017, and calculates monthly actual gross salary rate based on appointment basis (9 or 12) and appointment percent. You may change these columns, though any changes will not be reflected in the columns to the left. Column U is based on Column R. If you change the appointment percent (Column T), the monthly actual (Column U) will recalculate, based on the annualized salary rate in Column R.

Increase Summary Section: At the bottom (or on the last page) of the worksheet you will find a summary section. This is a tool to assist you in determining the total dollar amount for distribution.

- #1 - Total Annual Salary Base as of 11/17/17: This amount is the total of Column K (Annual Full-Time Salary Rate as of 11/17/17). **It is adjusted automatically based on entries in Column M (No Increase Codes C and D).** The total annual salary base excludes Sabbaticals and Tenured Appointment Placeholder positions.
- #2 – Target Amount of the 3% for Fully Satisfactory Increase: This cell calculates the 3% available for the awarding of salary increases. Changes in #1 – Total Base Salary Amount will automatically be accounted for in this cell.
- #3 – Amount Distributed Above in Column O: The sum of the salary increases from column Q (excludes placeholders coded "TP" entered into S-Dept Remarks)

- #4 - Amount Over/Under Distributed: Shows the dollars remaining to distribute and/or dollars over distributed
- #5 – Percent Distributed Above: Percent distributed (target equals 3%)

### **Additional Information**

Employees No Longer in Your Unit: You may have employees listed on your worksheet who are no longer in your department/unit or who are currently in another unit. If so, please enter one of the following codes for these employees:

- Terminated/retired and ineligible: Enter Code “B” in Column L (No Increase Code) and indicate date of termination or retirement in Column S (Dept. Remarks).
- Faculty member left your department and is employed elsewhere at the University: Enter Code “C” in Column L and the employee’s current TS Org. in Column S (Dept. Remarks).

Sabbaticals: Employees currently on sabbatical leave are listed in their regular, non-sabbatical position. Their sabbatical position is not on the worksheet. Complete the appropriate increase information for the listed regular, non-sabbatical position. OHR will prepare a separate spreadsheet for Payroll’s use to apply the increase to both the regular and sabbatical positions.

Tenured Faculty Holding Administrative Positions: Tenured faculty holding administrative positions are listed in both, their current, active administrative position AND in their placeholder position.

- The administrative position is listed on the appropriate time sheet organization worksheet.
- OHR will identify tenured placeholder positions by adding “TP” in Column S-Dept Remarks in the placeholder’s department/unit’s worksheet. You may also request that OHR group placeholder positions to special worksheets by college.
- If you need information regarding tenured appointment placeholder positions in your department, contact your Business Center Human Resources Partnership Manager or Edith Birky at 7-0736 or [edith.birky@oregonstate.edu](mailto:edith.birky@oregonstate.edu).

Adding employees: Three (3) additional blank rows are provided at the bottom of each worksheet to add employees, if the employee meets the eligibility criteria as required. Reasons to add employees include employees who in their current position have recently transferred to your unit from elsewhere in the university, employees who typically work .50 FTE or greater but are not on the worksheet, and employees who are missing from the worksheet without an apparent reason. If you do not have a sufficient number of blank rows on your worksheet, please contact Edith Birky at 7-0736 [edith.birky@oregonstate.edu](mailto:edith.birky@oregonstate.edu).

Stipends: Stipends for Faculty Excellence, Distinguished Professor, and other awards are not eligible for increases and, therefore, are not included on the worksheets. For other types of stipends, refer to the employee’s stipend conditions outlined in his/her personnel documents to determine if an increase is appropriate.

Effective Dates: The Banner entry for 9-month employees paid over 12-months will have a Banner Effective Date of the 16<sup>th</sup> and a Banner Personnel Date of the 1<sup>st</sup> of the month in which the increase is to be effective (January 1, 2018 for 12-month employees or February 1, 2018 for 9-month employees).

### **Important Dates:**

- December 6 – Completed salary worksheet recommendations due to your business center HR Partnership Managers, both the electronic MS Excel file and a signed paper copy with appropriate signatures as indicated on the worksheet.

- December 19 – OHR begins reporting to department/unit key representatives the approval of increase recommendations. Upon receiving notification, departments/units may begin informing employees who are receiving increases. ***Departments/units may not provide information to employees until they have received approval from Academic Affairs/OHR.***

**QUESTIONS:**

Should you have questions about this process, please contact your Business Center Human Resources Partnership Manager or:

Edith Birky, Academic HR Officer, Office of Human Resources at [edith.birky@oregonstate.edu](mailto:edith.birky@oregonstate.edu) or 7-0736

Donna Chastain, Director and Interim CHRO, Office of Human Resources at [Donna.Chastain@oregonstate.edu](mailto:Donna.Chastain@oregonstate.edu) or 7-2806