SALARY PLANNING MANAGERS/APPROVERS and HR POCs

SALARY PLANNING: PROPOSE MERIT & MSA INCREASES AND MERIT LUMP SUM

Salary Planning Managers/Approvers and HR POCs use this job aid for guidance during the Salary Planning process to propose and approve Merit Increases for employees (i.e., Merit/Cohort, Market Salary Adjustment/MSA, and/or Merit Lump Sum).

NOTE: Salary Planning Managers are career managers with compensation responsibility (Senior Associate, Chief Engineer/Scientist/Technologist/Technical Specialist level or higher)

Depending on their level of responsibility, a Salary Planning Manager may perform multiple manager roles during salary planning (i.e. propose increases as well as approve increases).

SALARY PLANNING MANAGER ROLE

PROPOSE MERIT INCREASE

Once the salary planning process has been launched, managers with salary planning responsibility receive an Outlook email notification and Workday Inbox Action.

NOTE: Salary Planning Managers receive one Workday Inbox Action titled Merit: Sr Staff Merit to use for all employees in the Merit Plan. If you are a Salary Planning Manager with employees in the International Cohort structure, you will receive a Workday Inbox Action titled Merit: Sr Staff Cohort.

NOTE: If you have subordinate organizations, once in the Workday task, click the Propose pencil icon to view and/or input salary increases for all employees in your immediate supervisory organization.

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1. All employees within a Supervisory Organization will appear in the Employee Grid. Click on an Employee within the grid to show additional details regarding the employee in the Smart Panel (blue box to the right of the grid):

   - Merit Target Range: Merit Increase Guidelines – This will auto populate based on the employee’s position in the salary range
2. Enter the Merit Increase %, Merit Increase Amount, Market Salary Adjustment (MSA) %, MSA Amount, Lump Sum %, or Lump Sum Amount for each employee. Click the Autofill button to provide all employees in the grid with a Merit/Cohort increase equivalent to the target.

   **NOTE:** Salary Planning Managers should not give both a salary increase and Lump Sum to an employee. If both are submitted for an employee, HR will contact the Salary Planning Manager and require they select either a salary increase or Lump Sum (not both).

3. The amount of the increase will be automatically deducted from the Merit Budget and/or the Additional Adjustment (MSA). If the Merit Budget and the Additional Adjustment stay green, you are at or below your budget. If the figures turn red, you are above the budget. Budgets are managed at the Group level.

4. Justification is required for the following:
   - Total Salary Increase > 10%
   - MSA Increase of any amount
   - Salary Action resulting in new salary > $225,000
     **NOTE:** Cohort Salary Planning Managers enter justification of “in Cohort plan”
   - Salary Action resulting in new salary > 5% above Compensation Range Maximum (Top Cohort)
   - Lump Sum

5. If an increase requiring a justification is needed, a Flag will appear. Click the hyperlinked number below the Flag for a description of the justification needed.

6. After entering salary actions for all employees in the grid, click the Submit button. If not ready to submit, you may make edits and exit the grid to return later.

   **NOTE:** Edits made will autosave
   **NOTE:** Clicking Submit will submit all employees within your organization to your Manager for review, even if no adjustment was entered.
7. Once submitted, you may review details of the task from the **Archive** tab of your **Inbox**
   - Click **More Details** to view the **Employee Grid**. This will be what you input, as well as update the data if other levels make adjustments.

8. The **Process** tab will show the Status of the process, the person who most recently took action, and the date the action was completed.
SALARY PLANNING MANAGER TIPS AND TRICKS

- **Increases** and **Lump Sums** will be paid out in the first regular payroll cycle after the effective date of the increase. Lump sums will be charged to the employee’s admin and taxed at the supplemental rate like a bonus.
- If you attempt to **Submit** with errors, the task will reappear in your Inbox and require the errors be corrected prior to submitting.
- If any employees in the Salary Planning grid have a **parallel event** in progress, a notification shows on the screen directly above the Salary Planning grid. Click the numbered hyperlink to view details about the parallel event. **If there is a parallel event, the event must be completed or cancelled prior to finalization of Salary Planning.**

**NOTE:** A **parallel event** is an open process that occurs within the same timeframe as Salary Planning. (i.e. employee transfers, employee terminations, employee Job Changes).
SALARY PLANNING APPROVERS

REVIEW/APPROVE MERIT INCREASES

Reviewers (salary plan approvers) within the salary planning process receive an Outlook email notification and Workday Inbox Action.

NOTE: You receive one Inbox Action for Merit: Sr Staff Merit even if you are approving merit for multiple supervisory organizations. If you are a compensation approver with employees in the International Cohort structure, you receive an Outlook email notification and a Workday inbox action titled Merit: Sr Staff Cohort.

1. Click the Sub Orgs icon to view which of your subordinate organizations have submitted. After reviewing the data, if you would like the previous manager to make edits or adjustments, click Actions ➔ Send Back to return the Salary Planning grid to the previous manager to correct or reconsider. You must include a Comment when sending back.

2. Click Actions ➔ Search Employees to access an employee within your subordinate organization. Upon locating the employee, select the checkbox located next to the employee’s name, click Review to review the proposed salary action. To change their proposed salary action, edit the increase and click Continue.

3. Click Actions ➔ Complete on Behalf to complete the Salary Planning grid on behalf of managers within your subordinate organization. This should only be done if someone is out of the office and the process must move forward. This should be used in exception cases only.

4. Once all your subordinate organizations have been submitted and you approve all increases and/or Lump Sums, click the Submit button.

NOTE: All Supervisory Organizations within the organization chain must be submitted before the top-level manager can Submit.
*Status definitions:*

- **Awaiting Action** – The current Supervisory Organization and those in the organizational hierarchy are awaiting input and submittal
- **Manually Advanced** – The next level manager pulled the actions forward into their inbox
- **Sent Back** – The next level manager sent the salary planning back for changes to be input
- **Submitted** – The prior manager submitted all employees within their Supervisory Organization

**COMPENSATION DASHBOARDS**

**OVERVIEW**

With your access to Salary Planning, you also have access to a manager [Salary Planning Dashboard](#) designed to provide reporting insight into key salary planning business processes.

You can access [Dashboards](#) by navigating to the Home screen and clicking the [Dashboards](#) worklet.

There are various [Dashboards](#) that Managers and Human Resources professionals can access depending on their level of security within Workday. [Dashboards](#) that are applicable to [Merit Increases](#) are:

1. **Managers**
   - Manager Salary Planning Dashboard
     - [BAH704 – Compensation Spreadsheet](#): Employee information and their compensation details

2. **Human Resources**
   - [HR Salary Planning Dashboard](#) - People Services
   - [HR Salary Planning Dashboard](#)

Upon clicking the Dashboard title, you will see various reports that show relevant data. The Dashboard consists of the following reports based on your security:

- **Merit and MSA Spend Analysis**: Illustrates the Merit and MSA spend against the salary budget
- **Promotion Spend Analysis**: Provides insight into promotion spend that has occurred throughout a specified date range
- **Advancement Step**: Tracks changes to Advancement Steps for employees aligned to the [Engineering & Science Professional](#) Job Family Group and the [Engineering Technical Support](#) Job Family Group
- **Compensation Analysis**: Provides the Compa ratio by [Supervisory Organization](#) and [Subordinates](#) (Compa ratio reflects salary position against the salary range midpoint)
NAVIGATING THE DASHBOARDS

The top section of the screen shows the dashboard name and describes what the dashboard includes. You can click on View More to get further insight on the content of the dashboard.

Clicking the Gear icon in top right of the blue section, will produce a list of different reports that are available within the Dashboard.

Within the Dashboard is a Custom Reports section that will show you a list of Custom Reports that you can run by clicking on the report name.

**NOTE:** Running the Custom Report takes you out of the Dashboard. To return to the Dashboard click on the home button , back button or Workday logo.

Each report has a Gear icon that you may use to refine your search. Click the Gear icon and select Edit Settings. The Edit Settings function will enable you to filter the analysis by Supervisory Organization, Group, Account Group, FSO, IMT and Cluster. To filter by Cluster, select All Organizations by Type > Location Hierarchy > All BAH Clusters.

When using the Supervisory Organization filter, you may need to enter the organization name or partial name for the field to populate. To include Subordinate Organizations within the selected Supervisory Organization, check the Include Subordinate Organizations box.

**NOTE:** If you receive an error message, the report load has timed out and you will need to use Edit Settings to further filter your request.

**NOTE:** Filters applied to the reports will remain in place until changed. You can either manually change or select Restore Default Settings to change the saved filters.

The Gear icon also allows you to export results to Excel and PDF, by clicking on the available options.
The data in the report is summarized in either charts or tables; you can click on the data to drill down to employee level information. **View By** option allows you to display the data in different views.

**View Details** provides the employee level data for that metric. The chart icon next to the **Gear** will allow you to manipulate the layout of the report where applicable.

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**HR REPORTS**

- **Promotion Nomination**: Employees who are nominated for promotion via the Promotion Nomination form within a specified date range
- **Change Job for Promotion**: Employees promoted via the Job Change - Promotion action within a specified date range

**CUSTOM REPORTS**

- **BAH704 – Compensation Spreadsheet**: Employee information and their compensation details
- **BAH707 – Merit Process Status for FY19**: Employee status details aligned merit process
- **BAH710 – Internal Equity Review for FY19**: Employee demographic and merit information
- **BAH718 – Salary Planning Exceptions for FY19**: Employees with exceptions for VP, People Services review