

**SAINT LOUIS UNIVERSITY
FY20 SALARY AND BUDGET DEVELOPMENT GUIDELINES
MARCH 2019**

The following guidelines have been established to assist in the FY20 Salary Planner and Finance Budget Development process. The FY20 salary increases relate to Promotion and Tenure adjustments only. In order to arrive at a balanced FY20 budget and permit investments in four priorities, STEM, experiential education, mental health and the CORE, no merit pay increase will be awarded this fiscal year.

Schedule

- **2/14/19**– Salary Planner and Finance Budget Development (FBD) Screens were loaded
- **3/19/19** – Budget Bases distributed and Salary Planner and FBD screens opened for data input and reporting
- **4/5/19** – First draft of cost reduction plans for administrative units, including specific positions and expenses to be eliminated, due to Brianne Burcke
- **4/16/19** – First draft of cost reduction plans for administrative units shared at a meeting with other VPs to assess cross-functional impacts
- **4/23/19** – Revised versions of administrative cost reduction plans due to Brianne Burcke
- **4/30/19** – Revised versions of administrative cost reduction plans shared at a meeting with other VPs to confirm cross-functional impacts are mitigated
- **5/1/19** – Final versions of administrative cost reduction plans due to Brianne Burcke
- **5/17/19** – Salary Planner and FBD screens will be closed for VP Academic Affairs (individual Schools/Colleges may close before this date pending Academic Affairs budget planning)
- **5/17/19** – Salary Planner and FBD screens will be closed for SLUCare and School of Medicine units (individual departments may close before this date pending Medical Center Finance budget planning)
- **5/24/19** – Salary Planner and FBD screens will be closed for all Administrative units
- **6/26/19** – Budget office will start the Roll process
- **7/9/19** – Labor distribution EPAFs need to be complete for first biweekly payroll on 7/19/19
- **7/16/19** – Labor distribution EPAFs need to be complete for July monthly payroll

Drs. Wilmott and Gillis will make the final determinations for the faculty (clinical physicians are excluded as their compensation comes from the SLUCare budget) and each Vice President will make the decisions for the staff in her or his area.

Performance Evaluation

The University Online Performance Evaluation (UOPE) for staff is available for processing. Upon release of the UOPE to the employee, the following will migrate to Salary Planner (these fields cannot be edited in Salary Planner):

- The Overall Assessment rating.
- Overall assessment rating comments, limited to 300 characters for Staff.

Comments can still be added in Salary Planner, but these will also be limited to 300 characters, similar to the UOPE comments. There is no need to repeat the information that will migrate from the UOPE into Salary Planner.

- Faculty are evaluated based on criteria determined by their College, School or Library.
- Promotion and Tenure Increases for faculty should be included in the performance comment.
- For SLUCare faculty, indicate if participating in an 80/20 compensation plan; however, the salary split in dollars is not required.

Vacant Positions

If a vacant position will be filled in FY20 and it is below the pay grade minimum, the unit should ensure there is enough budget dollars in the position to hire a candidate. Remaining vacant position dollars can be used at the Vice President, Provost or Dean's discretion and within the purview of the Position Control Process. Vacant position budgets can be used for market/equity increases for faculty/staff positions that are approved by the respective Vice President, Provost or Dean, Human Resources and the Cabinet. The position budgets for vacant positions that will not be filled should be moved to a "holding position" under the Vice President, Provost, or Dean. Any vacant positions with \$0 budget, excluding pooled positions, will then be closed.

Human Resources Review

Financial Planning & Budget will provide your Human Resources (HR) Consultant access to the staff salary report (PWB0006). HR Consultants are available for assistance with the UOPE process and will review performance evaluations and PIMs for consistency with performance evaluation guidelines and salary recommendations. HR Consultants will also review for underfunded vacant positions to be filled in FY20.

Salary Planner and Finance Budget Development screens

The Salary Planner and Finance Budget Development screens were loaded February 14, 2019. The Salary Planner extract and scenario is denoted as "FY20 BUDGET". The Finance Budget Development Budget ID is "20". It is important to note that when the Salary Planner screens were opened, it was a snapshot of current job records as of February 14, 2019. Any job changes, other than new hires and terminations, from February 14, 2019 until the time the budget roll is completed, will not be automatically refreshed in Salary Planner. You should contact Planning and Budget to update the information in Salary Planner for the current salary or department. Your budgets submitted via Salary Planner and Finance Budget Development must balance to your FY20 Budget Base distributed by the Budget Office, VP Academic Affairs, or the HSC Finance Office. The Budget Bases were emailed to everyone on March 19, 2019. All information that you enter in Salary Planner and Finance Budget Development will be effective July 1, 2019. Salary Planner will automatically update nightly so that any new positions created in Internet Native Banner will appear the following day. This holds true for new hires and terminations. Just as last year, all personnel account code amounts will feed from Salary Planner to Finance Budget Development every half hour.

Salary Planner Fields:

Salary Change Percent

This column should be used to show merit increases only based on performance. Since there is no merit being awarded for FY20, this field will not be used.

Other Change Percent

This column should be used for approved base pay adjustments other than merit that are funded by existing budget. Examples are as follows:

- Staff promotional increases
- Reclassifications
- FTE adjustments
- Phased retirements of employees
- Faculty returning from or going on sabbatical/other leaves
- Promotion and tenure

Reports

Similar to last year, PWB0006 & PWB0010 remain the official Staff and Faculty Salary reports as well as PWB0005a for balancing. These reports are available under WebFOCUS Dashboard. If you would like to include anticipated salary amounts related to summer pay, overload and secondary assignments in the Salary Planner comments text, you may do so, but it is not required.

To assist departments with special circumstances, Financial Planning & Budget will be running various audit reports frequently throughout the budget cycle. The reports will identify pay rates below minimum wage and position budgets entered for inactive and erroneous org/fund strings. Resolving these issues during the budget cycle will decrease the anticipated July Budget Roll timeline.

Training

To schedule individual Salary Planner working sessions, contact Janet Strader (7-2891), Kirsten Miller (7-2228), John Severs (7-7073), or Samantha Myers (7-3920) in Financial Planning & Budget. If you choose to do so, please review the checklist below first and bring a copy of the specific issues/problems you are having. The more detail you can provide us, the better able we are to help resolve your problems. Additional instructions are also located under the Budget Documents on the Financial Planning & Budget page of the Business & Finance website.

Budget Base

The budget bases you received on March 19, 2019 include planned FY20 Optimal Structure and Academic Reinvention adjustments, merit (not applicable), cost reductions, permanent budget revisions through February 28, 2019, contractual increases, allowances (no changes now), and previously approved program expenses. Please remember to address all FY20 items listed on your budget base prior to submitting your budget. As always, if you have any questions, please do not hesitate to contact Financial Planning & Budget, Janet Strader (7-2891), Kirsten Miller (7-2228), John Severs (7-7073), Samantha Myers (7-3920) or Brianne Burcke (7-2991).

FY20 Salary Planner and Finance Budget Development Checklist

1. Upon receipt review Budget Base for errors/omissions.

Salary Planner

2. Enter Salary Planner through Self Service Banner, Budget Management Tab.
3. Enter all salary/job distribution changes if applicable.
4. Review Job Detail screen for all employees.
5. Enter all position increases if applicable.
6. Enter all position distribution changes if applicable.
7. Review List by Position screen to ensure:
 - a. All full-time position budgets are equal to or greater than the corresponding full-time employee's salary.
 - b. All pooled position budgets (including Overtime and Supplemental Pay positions) are sufficient to fund anticipated FY20 part-time employee or student hours worked for all employees in the pooled position.
 - c. Vacant position budgets are equivalent to the anticipated annual salary of the new employee if to be filled in FY20.
8. Within the List by Employee screen:
 - a. Performance evaluation ratings and comments will display from the UOPE. This field is not editable for additional comments and will be presented in the Salary Book to the appropriate unit VP.
 - b. In the comments section, notate specific comments as related to amounts/percents included in the Other Change Percent column.
9. Select the Salary Planner domain in the Web FOCUS dashboard. Run PWB0006 for staff and PWB0010 for faculty.
10. Run PWB0005a to confirm that all your position budgets and salary increases are correct:
 - a. The Org/Fund/Account totals should match your Finance Budget Development report totals by FOAPAL.
 - b. PWB0005a is available only in Excel, but is easy to sort by position number, employee name, etc.

Finance Budget Development

11. Enter Finance Budget Development through Banner Self Service, Budget Management Tab.
12. Enter line item/account code budgets for FY20:
 - a. Remember to use the correct Org/Fund combination. Your FY19 designations will carry forward to FY20 unless updated.
 - b. Please do not budget INACTIVE funds or accounts.
13. After saving your work in Finance Budget Development, go to the Web FOCUS dashboard to run your salary and balancing reports.

14. Reminder: Salary Planner is updated every 30 minutes (including benefit costs), so there could be up to a 30-minute delay from when you enter your Salary Planner information until Finance Budget Development is updated to reflect those changes. If you run your balancing reports too soon, the changes made in Salary Planner will not appear in your reports. All changes made to Finance Budget Development are immediate and without delay.
15. Select the Finance Budget Development Domain in the Web FOCUS dashboard. Run FBR011 to confirm that your total matches your FY20 Budget Base total.
16. Review your FY20 Budget Base again to confirm that you have addressed every item included for FY20.
17. Save all your final balanced reports.

**SAINT LOUIS UNIVERSITY
FY 2020 FRINGE BENEFIT RATES**

<u>BANNER ACCOUNTS</u>	<u>DESCRIPTION</u>	<u>UNIVERSITY FUNDS</u>	<u>SPONSORED PROGRAMS</u>
601XXX	UNIVERSITY MEDICAL GROUP - PHYSICIANS	17.25%	15.9%
609000	FT Faculty UMG Cost Sharing	17.25%	15.9%
SALARIES AT FULL TIME RATE:			
611XXX	Full-time Faculty - Regular Session	33.25%	29.0%
619000	FT Faculty Cost Sharing	33.25%	29.0%
631XXX	Administrative - Base Salary	33.25%	29.0%
641XXX	Full-time Staff - Regular (Hourly)	33.25%	29.0%
647XXX	Full-time Staff - Regular (Salaried)	33.25%	29.0%
649000	FT Staff Regular Cost Sharing	33.25%	29.0%
681XXX	Housestaff/Resident	29.00%	29.0%
SALARIES AT PART TIME RATE:			
603000	UMG - PHYSICIANS - Supplemental Pay	17.25%	15.9%
608XXX	UMG – PHYSICIANS - Participation Fees	17.25%	15.9%
612000	Full-time Faculty - Summer Session	15.75%	15.5%
613XXX	Full-time Faculty - Supplemental Pay	15.75%	15.5%
618XXX	Full-time Faculty – Participation Fees	15.75%	15.5%
620XXX	Part-Time Faculty - Regular Session	15.75%	15.5%
621XXX	Part-Time Faculty - Regular Session	15.75%	15.5%
622000	Part-Time Faculty - Summer Session	15.75%	15.5%
623XXX	Part-Time Faculty - Supplemental Pay	15.75%	15.5%
628XXX	Part-Time Faculty – Participation Fees	15.75%	15.5%
638XXX	Administrative – Participation Fees	15.75%	15.5%
642000	Full-Time Staff – Overtime	15.75%	15.5%
643000	Full-Time Staff - Supplemental Pay	15.75%	15.5%
648000	Full-Time Staff – Participation Fees	15.75%	15.5%
651XXX	Part-Time Staff - Regular (Hourly)	15.75%	15.5%
657XXX	Part-Time Staff - Regular (Salaried)	15.75%	15.5%
652000	Part-Time Staff – Overtime	15.75%	15.5%
653000	Part-Time Staff - Supplemental Pay	15.75%	15.5%
654000	Part-Time Staff - Seasonal Help	15.75%	15.5%
658000	Part-Time Staff – Participation Fees	15.75%	15.5%
683000	Housestaff/Resident - Supplemental Pay	15.75%	15.5%
688XXX	Housestaff/Resident – Participation Fees	15.75%	15.5%
STUDENT LABOR:			
66XXXX	Student Labor	N/A	N/A
67XXXX	Stipends	N/A	N/A