



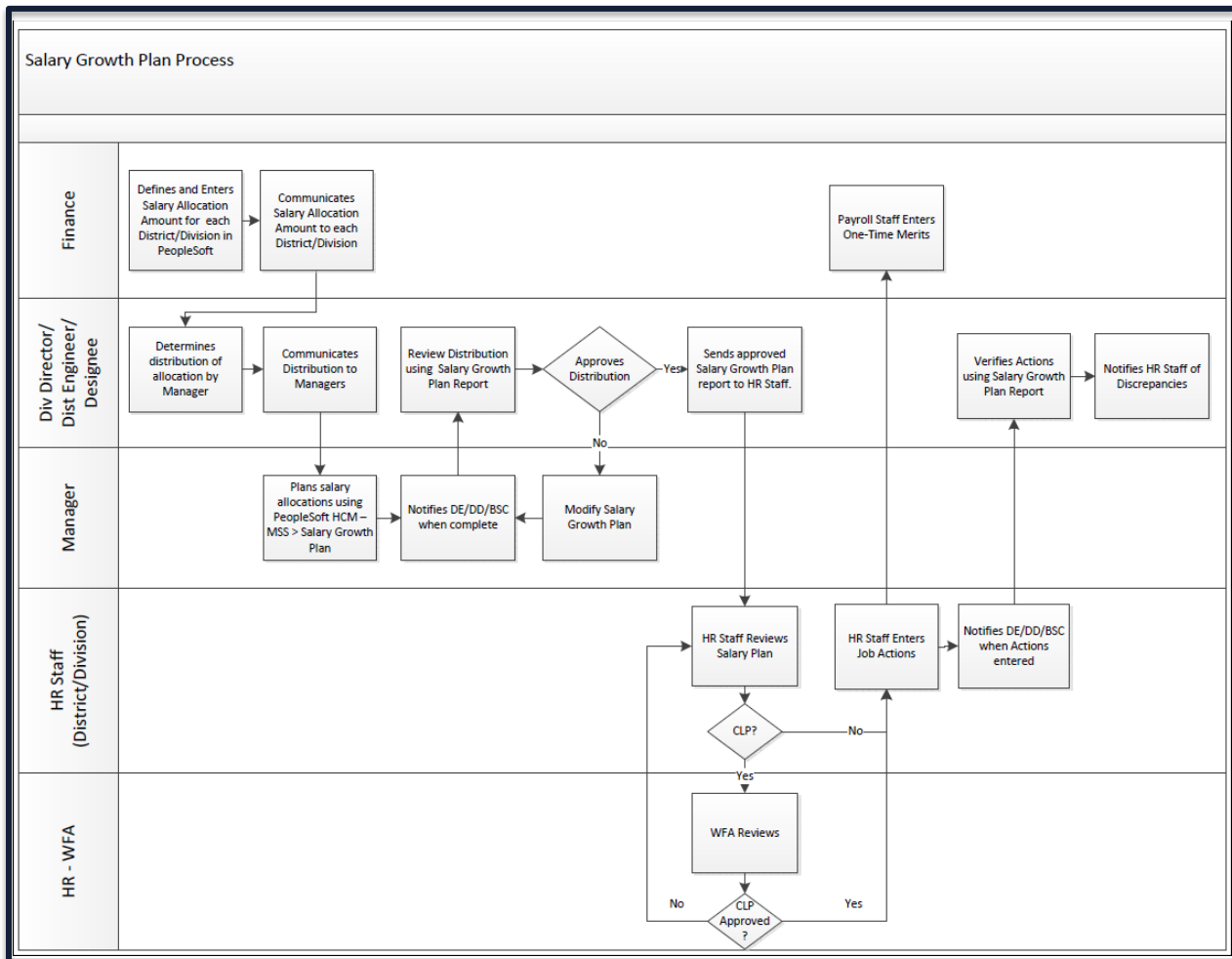
# Salary Growth Planning

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Human Resources Division

Job Aid

# Salary Growth Planning



District Engineers and Division Directors are responsible for developing a salary actions plan, which limits the increase to their total salaries to no more than 1% in the current fiscal year and 2% for the next fiscal year.

This process will be maintained within PeopleSoft HCM.

## Helpful Resources

Query/ Report	Report Description	PeopleSoft Role	PeopleSoft HCM Navigation
Disciplinary Action by Dept. Query	Identifies employee disciplinary actions for the date range entered.	Manager	Manager Self Service > TxDOT Manager Quick links
		HR Staff	Reporting Tools > Query > Query Viewer Query Name = X_HR_DA_SUMMARY_BY_DEPTID
Merit Eligibility Query	Identifies the date the employee is eligible to receive the next merit.	Manager	Manager Self Service > TxDOT Manager Quick links
		HR DD Reporting HR Staff	Reporting Tools > Query > Query Viewer Query Name = X_HR_MERIT_ELIGIBILITY
Pay Increase Budgeting Query	Identifies the date and percent increase that was given to employee for the date range entered.	Manager	Manager Self Service > TxDOT Manager Quick links
		HR DD Reporting HR Staff	Reporting Tools > Query > Query Viewer Query Name = X_HR_SALARY_ACTIONS_BUDGETING
Manager Dashboard – Compensation tab	Identifies the Minimum, Midpoint, and Maximum of the Employee's current salary grade. The Employee's Salary Quartile is also included.	Manager	<p>Manager Self Service &gt; Manager Dashboard &gt; Direct Line Reports - Compensation tab</p> <p>Click on the Grid  to download the information to Excel.</p> <p>Save the Excel spreadsheet.</p>
Last Merit Spreadsheet Report	Identifies the last date the employee received a Merit/One Time Merit and Promotion.	HR DD Reporting HR Staff	Reporting Tools > DDO/BSC Reporting Quick Links
Career Ladder Promo or Merits	Identifies employee current quartiles.	Manager	Manager Self Service > TxDOT Manager Quick links
		HR DD Reporting HR Staff	Reporting Tools > DDO/BSC Reporting Quick Links Or Reporting Tools > Query > Query Viewer Query Name = X_HR_CLP_MER_REQUEST

## I. Planning

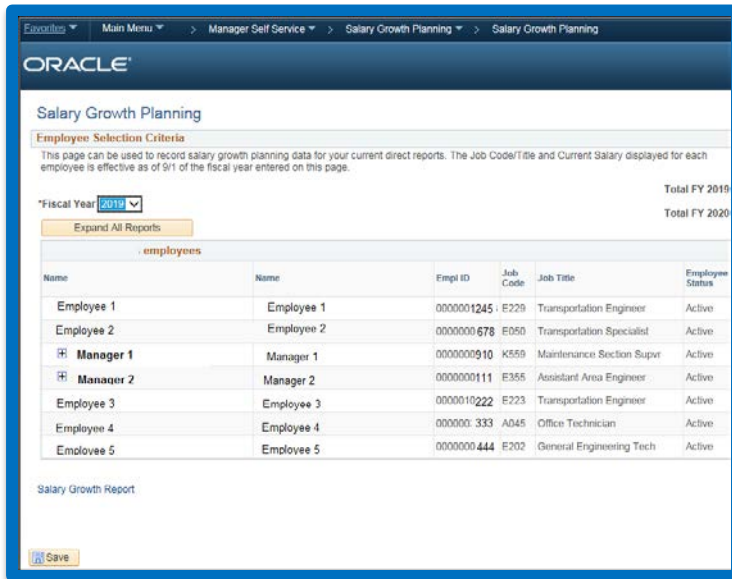
### STEP 1 Navigate to the Salary Growth Planning component

Managers will use the following navigation:



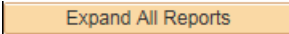


Note: If the function does not appear initially, log out of the application and clear the browser cache.

The following page will appear for data entry and default to the current Fiscal Year. The employee’s Job Code and Current Salary will be displayed as of 9/1 of the Fiscal Year. If the previous Fiscal Year is selected, the data for the previous year will be displayed in Display-Only mode.



## STEP 2 Review the Employee Data

To view all of the data on the page:

- Scroll to the right to view: Last Performance Evaluation Date, Evaluation Status, and Evaluation Rating.
- Click  button to view Indirect Reports. Or click  located in the 'Name' column to view Indirect Reports. Click  to hide Indirect Reports. **This action can take up to 5 minutes to complete depending on the size of the District/Division or department.**

To view all of the data from an Excel spreadsheet.


- Scroll to the right. Click on the Grid  to download the information to Excel. It is located above the column titled 'Notes & CLP/PEI Justification'.

### STEP 3 Enter the Proposed Salary Actions

Proposed Salary Action	Proposed Job Code	Proposed Job Title	Proposed Salary Grade	Maximum Salary Allowed	Proposed Effective Date	Proposed Monthly/1XM Increase Amt	Last Performance Eval Date - Status - Rating
Merit				11837.660	02/01/2019	75.000	12/31/2017 - Approval - Above Expectations
Career Li	K282	Electronics Technician III	19	5746.660	03/01/2019	125.000	12/31/2017 - Acknowledged - Above Expectations
One Time					08/01/2019	1175.000	12/31/2017 - Completed - Exceeds Expectations
Professio	E222	Transportation Engineer I	22	7039.910	04/01/2019	450.000	12/31/2016 - Acknowledged - Superior
							12/31/2017 - Completed - Exceeds Expectations
							12/31/2017 - Approval - Superior

- Select the Proposed Salary Action.
- Select the Proposed Job Code.  
This is required for Career Ladder Promotion or Profession Engineer Jobs. The Proposed Job Title, Salary Grade and Maximum Salary Allowed will be displayed.
- Enter the Proposed Effective Date.  
*(If the employee received a pay increase prior to the effective date entered, the salary amount will change to that amount.)*
- Enter the Proposed Monthly Increase or One Time Merit Amount.

The #Affected Months, Current FY Impact and Next FY Impact will be automatically calculated upon save.

The  symbol will appear in the upper right hand corner as the system will also perform the validations below.

If you receive this Message....	Do this....
Error Messages (The data must be corrected before it can be saved.)	
Action must be effective on the first of the month.	Modify the Proposed Effective Date. The effective date must be the first of the month.
Action must be effective during the selected fiscal year.	Modify the Proposed Effective Date. The effective date must fall within the fiscal year selected.

Warning Messages (The field in error will be highlighted, but the data can be saved.)	
Invalid 1XM action. Employee received a Merit or a one-time merit during the previous six months; action invalid for effective date proposed.	Modify the Proposed Effective Date or Proposed Salary Action. Since this message is a warning, the data can be saved without change.
Invalid 1XM action. Employee received a Competitive or Career Ladder Promotion during the previous six months; action invalid for effective date proposed.	Modify the Proposed Effective Date or Proposed Salary Action. Since this message is a warning, the data can be saved without change.
Invalid PAY action. Employee received a Merit or a one-time merit during the previous six months; action invalid for effective date proposed.	Modify the Proposed Effective Date or Proposed Salary Action. Since this message is a warning, the data can be saved without change.
Invalid PAY action. Employee received a Competitive or Career Ladder Promotion or Professional Engineer Jobs during the previous six months; action invalid for effective date proposed.	Modify the Proposed Effective Date or Proposed Salary Action. Since this message is a warning, the data can be saved without change.
The salary must increase at least 3.4% for Schedule B or \$30 for Schedule A.	For Career Ladder Promotion or Prefssional Engineer Job, the salary must increase at least 3.4% for Schedule B or \$30 for Schedule A.
Base salary is above the maximum for the employee's Job Code. The Proposed Amount of Increase will cause the salary to exceed the maximum amount allowed for the salary grade.	Modify the Proposed Monthly Increase Amount
Base salary is below the minimum for the employee's Job Code. The Proposed Amount of Increase will cause the salary to fall below the minimum amount allowed for the salary grade.	Modify the Proposed Monthly Increase Amount

**STEP 4** Enter the Notes & CLP\PEI Justification by scrolling to the right.

**Note:** This field is required if the proposed salary action is Career Ladder Promotion or Professional Engineer Jobs. It is limited to 1024 characters.

**STEP 5** Click the Save button  at the bottom of the page


The Total Impact will be calculated at the top of the page. The system will perform the following additional edits:

If you receive this Message....	Do this....
Proposed Effective Date is required.	Enter the Proposed Effective Date.
Proposed Job Code field is required for CLP.	Enter the Job Code.
Notes/CLP Justification field is required for CLP actions.	Enter the justification.


**\*\* Remember: SAVE often to avoid re-work. \*\***

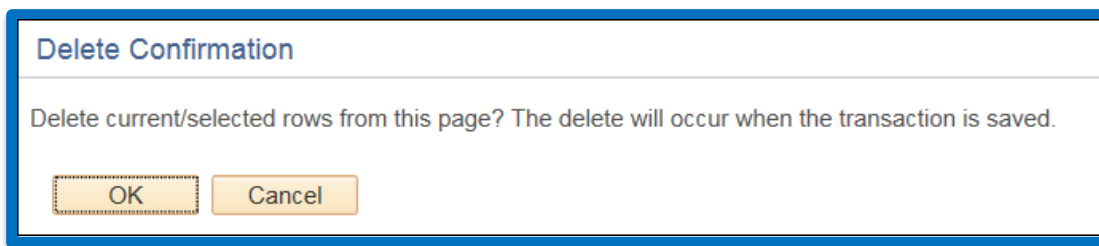
## STEP 6 Add or Delete rows (If Needed)

An employee may receive more than one salary action per fiscal year.

1. Find the Employee's row
2. Scroll to the Right
3. Click 
4. A new row will appear for the employee.
5. Enter Proposed Salary Action, Effective Date, and Amount

An entire row can be deleted if data is entered incorrectly.

1. Find the Employee's row
2. Scroll to the Right
3. Click 
4. The following confirmation message will appear:



5. Click 'OK' to confirm deletion. Click 'Cancel' to cancel the request.

**Note:** The next time you enter the page, the Employee's row will reappear with the Salary Action data cleared.

## II. Reporting

### STEP 1 Navigate to the Report.

The **Salary Growth Report** is available to several PeopleSoft roles and can be accessed through various paths.

**Run this report often to make sure that the allocation is not exceeded.**

PeopleSoft Role	PeopleSoft HCM Navigation
Manager	Manager Self Service > Salary Growth Planning (The report link is located at the bottom of the page) Manager Self Service > TxDOT Manager Quick Links
HR DD Reporting	Reporting Tools > DD/BSC Reporting Quick Links
HR Staff Payroll FIN Administrator	Compensation > TxDOT Reports

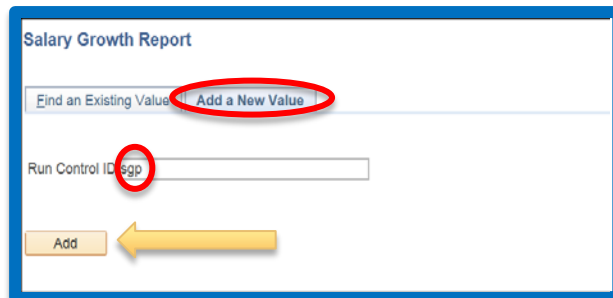
**Note:** The HR DD Reporting role is used to run HR reports and queries for the whole District/Division or combination of District/Divisions. It can be requested using TxDOT Now > ERP > Role Request.

## STEP 2 Select a Run Control Record

The report requires the entry of a Run Control record. The run control record contains the parameters that will be used by the report. The same run control record can be used every time the report is run.

It is recommended that a new run control should be created initially and used each time the report is run.

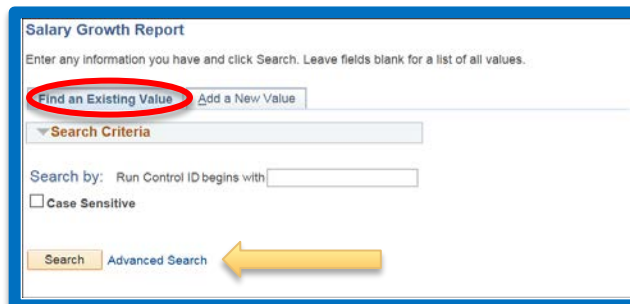
### To Create a New Run Control record:



The screenshot shows the 'Salary Growth Report' interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Add a New Value' tab is selected and circled in red. Below the tabs is a text input field labeled 'Run Control ID' containing the text 'sgp', which is also circled in red. At the bottom left, there is an 'Add' button with a yellow arrow pointing to it from the right.

- Select the 'Add a New Value' tab.
- Enter a value for the Run Control ID.
- Click the 'Add' button.

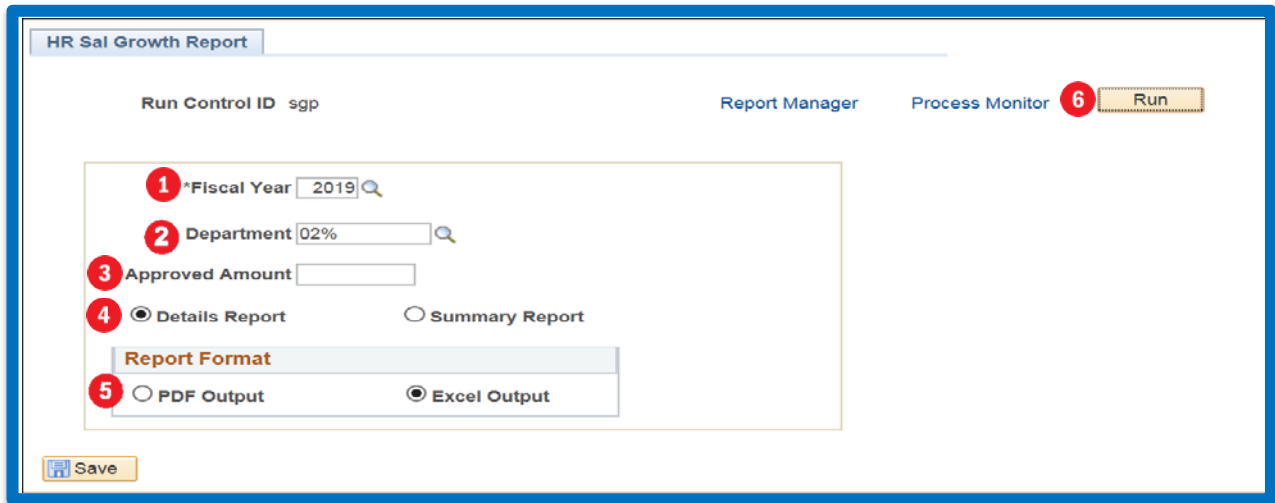
### To Use an Existing Run Control record:






The screenshot shows the 'Salary Growth Report' interface. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The 'Find an Existing Value' tab is selected and circled in red. Below the tabs is a search section with a dropdown menu for 'Search Criteria'. Underneath, there is a 'Search by:' field with the text 'Run Control ID begins with' and an input field. There is also a checkbox for 'Case Sensitive'. At the bottom left, there is a 'Search' button and an 'Advanced Search' link. A yellow arrow points to the 'Search' button from the right.

- Select the 'Find an Existing Value' tab.
- Click the 'Search' button.
- If multiple Run Control records exist, the list will appear for selection.  
If a single Run Control record exists, the system will proceed to the Salary Growth Report parameter page.

### STEP 3 Enter the Report Parameters




1. Select Fiscal Year by clicking . The previous, current or next fiscal year can be selected. The current fiscal year will be automatically populated.
2. Select the Department from the list by clicking . The manager’s District/Division number will be automatically populated.
3. Enter the Approved Amount or Leave Blank.  
If the allocation amount is distributed within the District/Division by Manager, then this amount is the Manager’s portion of the overall District/Division allocation as communicated by District Engineer, Division Directory or Designee.  
  
If this field is blank, the District/Division total allocation amount will be displayed in the report.  
  
**Note: It is critical that the correct amount be entered here so that the remaining balance displayed in the report will be accurate.**
4. Select the Report Type by clicking either the ‘Details Report’ or ‘Summary Report’ radio button.
5. Select the Report Format by clicking either the PDF Output or Excel Output radio button.
6. Click the Run button  at the top of the page.

### STEP 4 Run the Report

The following page will appear:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	HR Sal Growth Report	X_HR_SAL_GR	Application Engine	Web	XLS	Distribution

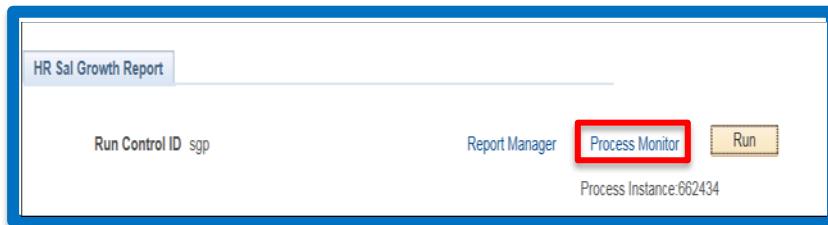
Click the  button.

The Salary Growth Report parameter page will be displayed and the process instance of the report will appear.

Process Instance: 662377

### STEP 6 Views the Report

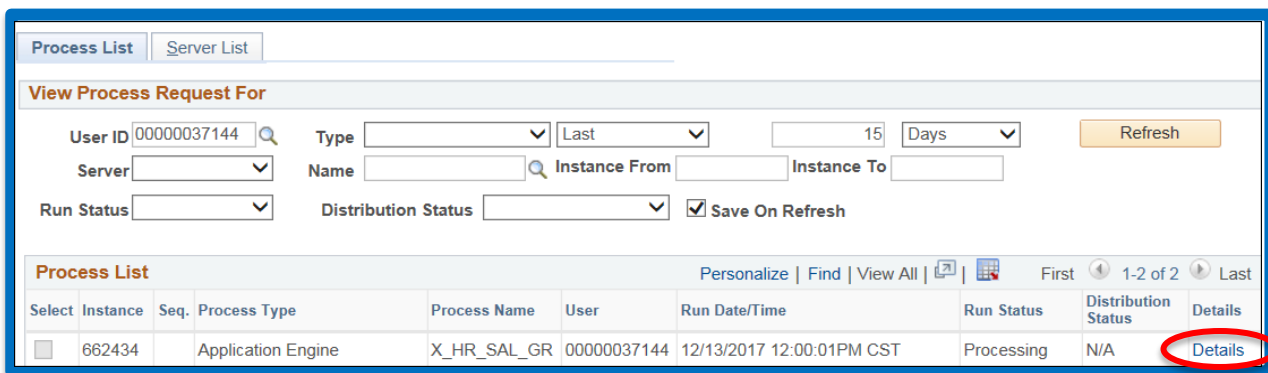
Click 'Process Monitor' link.



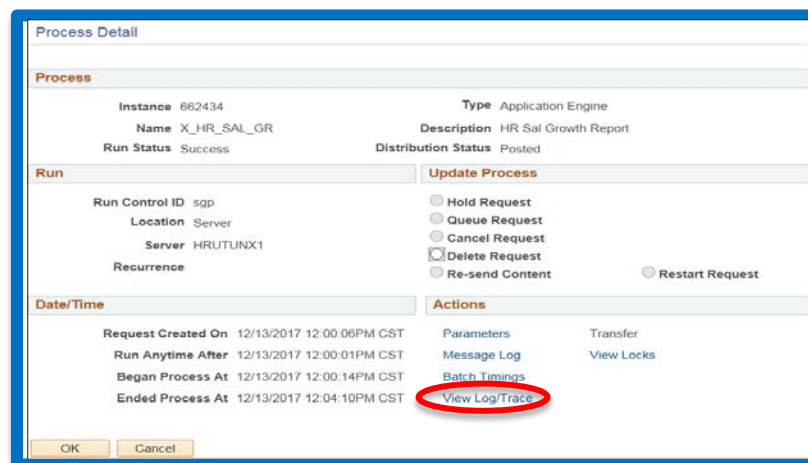
The page below will appear. Click the  button.

The Run Status will change from 'Processing' to 'Success' and the Distribution Status will change to 'Posted' when the report is ready.

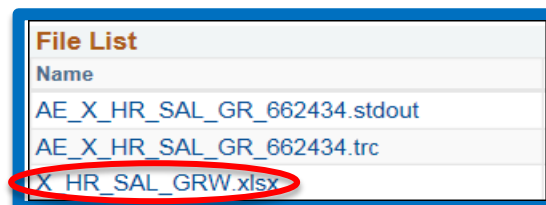
Click the 'Details' link.



Click the 'View Log/Trace' link.



Click on the file X\_HR\_SAL\_GRW.xlsx.  
If the PDF output was selected, then the file X\_HR\_SAL\_GRW.pdf will appear.



### III. Delegation

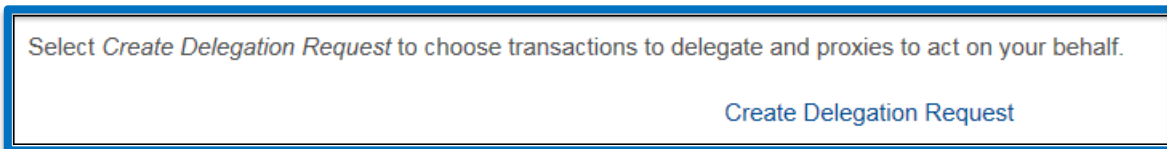
Managers will have the ability to delegate the salary planning functionality to their peers/direct reports the same as with other functions within PeopleSoft HCM. The proxy must be a Manager.

The following steps are performed by the Manager.

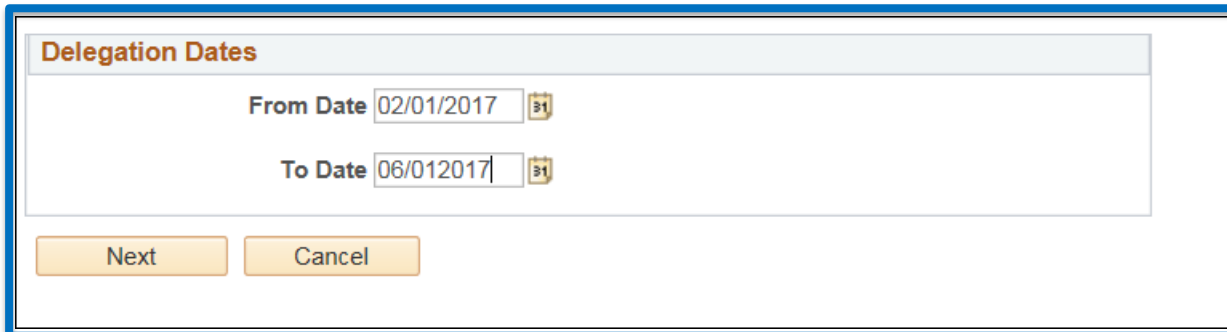
**STEP 1** Navigate to the Manage Delegation component using the following navigation:



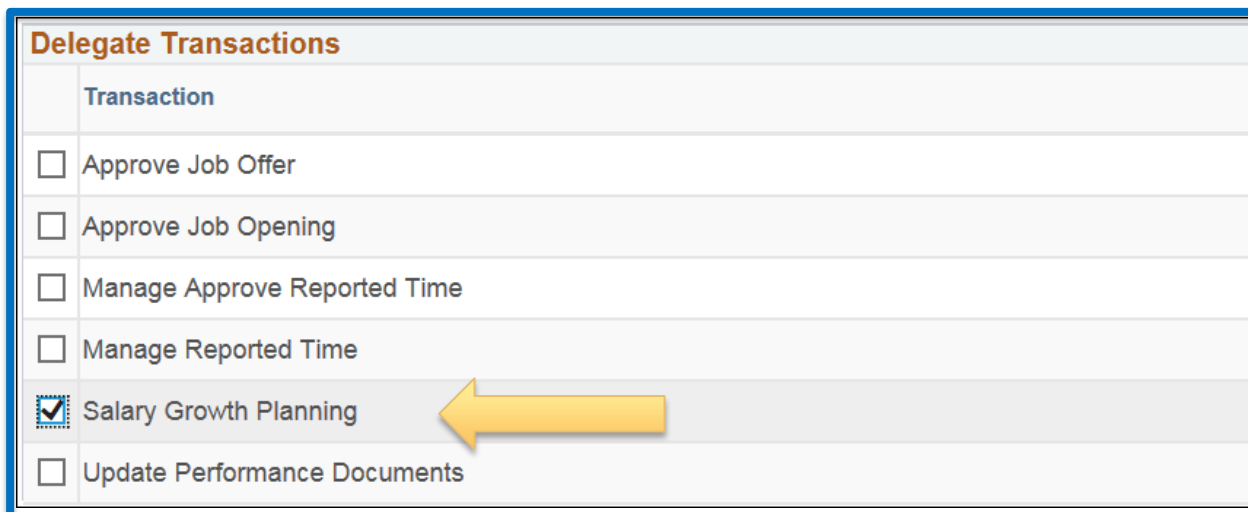
**STEP 2** Click the link - 'Create Delegation Requests'



**STEP 3** Enter the Delegation Dates and Click 

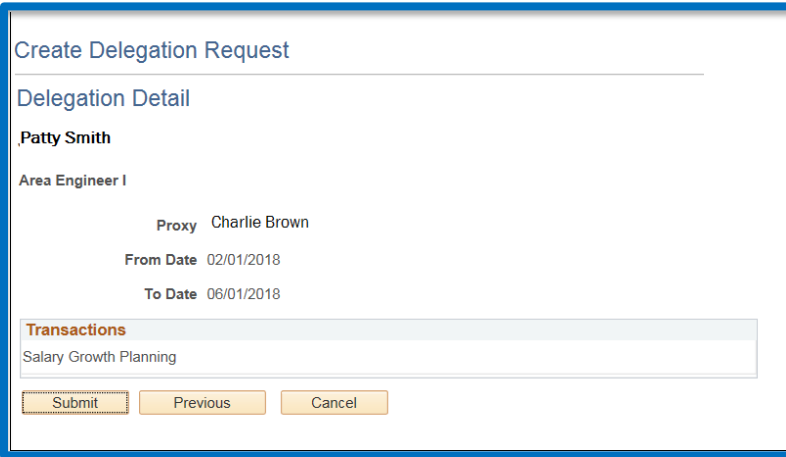


**STEP 4** Select the Delegate Transaction 'Salary Growth Planning'. Click the  button.



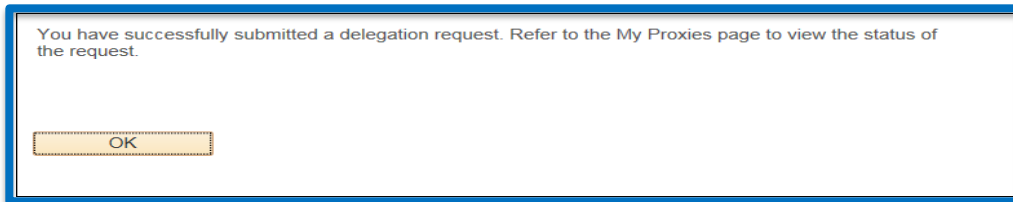
**STEP 5** Select a Delegate. Click the  button.

**STEP 6** Click the Submit button.



The screenshot shows a web form titled "Create Delegation Request". Under the heading "Delegation Detail", the user "Patty Smith" is listed as the "Area Engineer I". The "Proxy" is identified as "Charlie Brown". The "From Date" is "02/01/2018" and the "To Date" is "06/01/2018". Below this information is a "Transactions" section with a text input field containing "Salary Growth Planning". At the bottom of the form are three buttons: "Submit", "Previous", and "Cancel".

The following message will appear.



The screenshot shows a message dialog box with the text: "You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request." Below the text is an "OK" button.

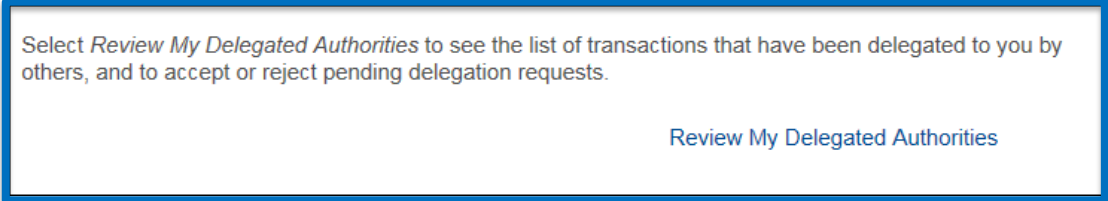
The system will send an email notification to the proxy.

The following steps are performed by the Proxy (the employee selected in Step 5).

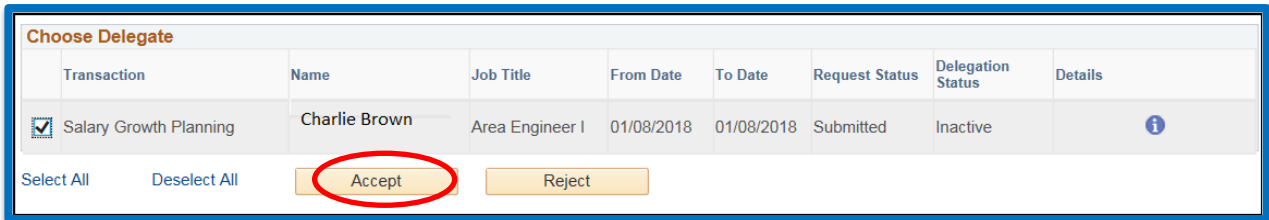
**STEP 7** Navigate to the Manage Delegation component.



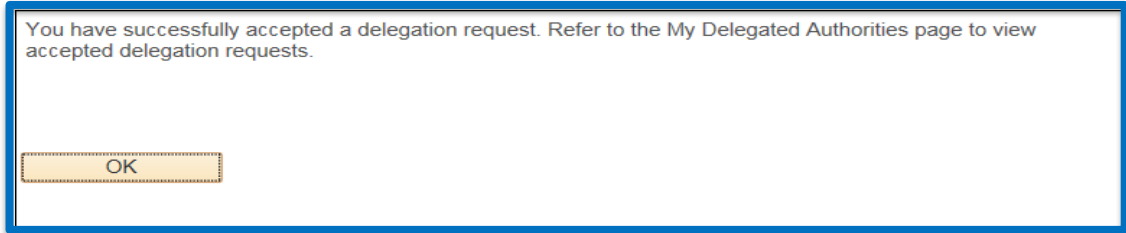
**STEP 8** Click the link - 'Review My Delegated Authorities'



**STEP 9** Select the Transaction and Click the  button to complete the process.

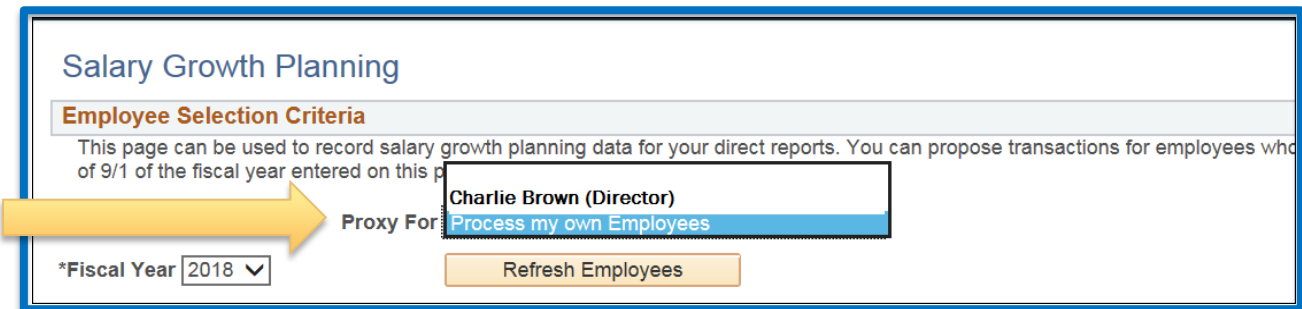


The following message will appear.



**STEP 10** Verify Delegation

The Proxy will be able to view and update the salary plan of the manager by changing the 'Proxy For' field. Click the 'Refresh Employees' button.



#### **IV. HRD Only**

In order to ensure that the allocation of each District/Division is not exceeded, an additional validation has been added to the Job Data component within PeopleSoft.

If the Merit or Career Ladder Promotion entered will cause the District/Division to exceed the allocation amount, the following warning message will be displayed:



**STEP 1** Remove the Action Entered.

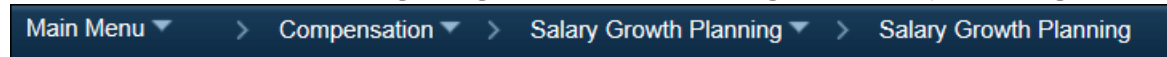
**STEP 2** Run the Salary Growth Report to verify the available allocation remaining.

**STEP 3** Notify District Engineer/Division Director or Designee to determine if change is needed.

## V. HRD Only – Salary Planning

### STEP 1 Navigate to the Salary Growth Planning component

HR Staff will use the following navigation to assist managers in salary planning:



Note: If the function does not appear initially, log out of the application and clear the browser cache.

### STEP 2 Enter a Department

For HR Staff , the following page will be displayed for input of department.

Enter a specific Department (ie. 010001) or partial Department (ie. 01)

Click the  button.

A screenshot of a web application search interface. At the top is a tab labeled "Find an Existing Value". Below it is a section titled "Search Criteria" with a dropdown arrow. The search criteria is set to "Department" with a dropdown arrow, followed by the text "begins with" and an empty text input field. At the bottom of the search area are two buttons: "Search" and "Advanced Search".

If a partial department is entered, the follow list will appear for selection.  
Select a Department.

Note: Departments that end in '0000' do not contain employees and should NOT be selected. Also, inactive departments may included in the list.

Search Results

View All First 1-20 of 20 Last

Department	Set ID	Description	Short Description
010000		TXDOT PARIS DISTRICT (PAR)	PAR
010001		TXDOT MAINT FANNIN COUNTY (PAR)	MNT FANNIN
010002		TXDOT MAINT RED RIVER COUNTY (PAR)	MNT RD RVR
010003		TXDOT MAINTENANCE DELTA COUNTY (PAR)	MNT DELTA
010004		TXDOT MAINTENANCE RAINS COUNTY (PAR)	MNT RAINS
010005		TXDOT MAINTENANCE HUNT COUNTY (PAR)	MAINTENANC
010006		TXDOT MAINT FRANKLIN COUNTY (PAR)	MAINTENANC
010007		TXDOT MAINTENANCE LAMAR COUNTY (PAR)	MAINTENANC
010008		TXDOT MAINT GRAYSON COUNTY (PAR)	MAINTENANC
010009		TXDOT MAINT HOPKINS COUNTY (PAR)	MAINTENANC
010025		TXDOT TRAFFIC SIGNAL CREW (PAR)	TRAFFIC SI
010038		TXDOT BRIDGE MAINTENANCE (PAR)	BRIDGE MAI
010050		TXDOT AREA ENGINEER GREENVILLE (PAR)	AREA ENGIN
010051		TXDOT AREA ENGINEER PARIS (PAR)	AREA ENGIN
010052		TXDOT AREA ENGINEER SHERMAN (PAR)	AREA ENGIN
010053		TXDOT SULPHUR SPRINGS AREA ENG (PAR)	SS AREAENG
010073		TXDOT TRANSP PLANNING & DEV (PAR)	TRANSPORTA
010713		TXDOT DISTRICT ENGINEER (PAR)	DISTRICT E
010750		TXDOT CONSTRUCTION (PAR)	CONSTRUCTI
010770		TXDOT MAINTENANCE (PAR)	MAINTENAN

**STEP 3** Proceed with entering salary actions as described on page 4.

Note: The list of employees that exist in the department will be displayed. instead of the reporting hierarchy view that manager's view.

**STEP 4** Navigate to another Department using the buttons located at the bottom of the page.

