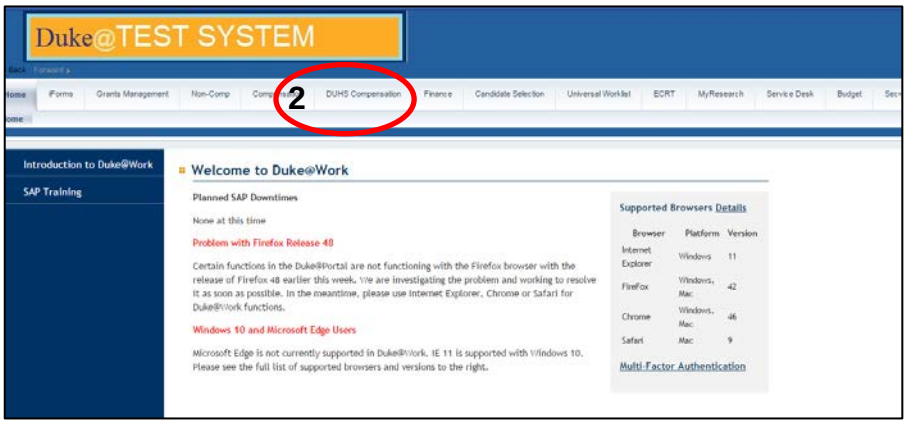
Duke Health: Salary Administration

Logging In:

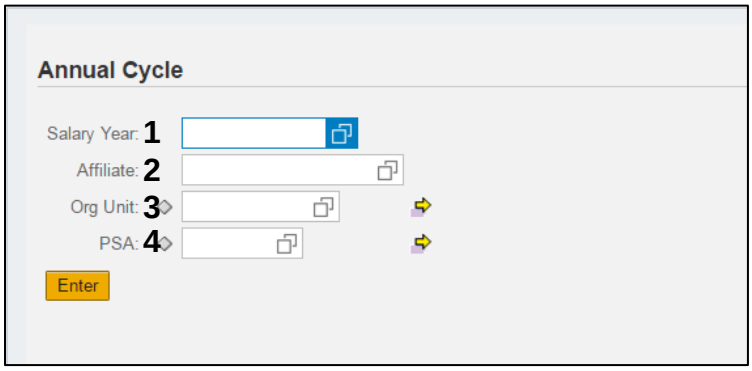
1. Log in to the Duke@Work website—**work.duke.edu**—using your NetID, password, and multi-factor authentication.



2. Click on the **DUHS Compensation** tab.

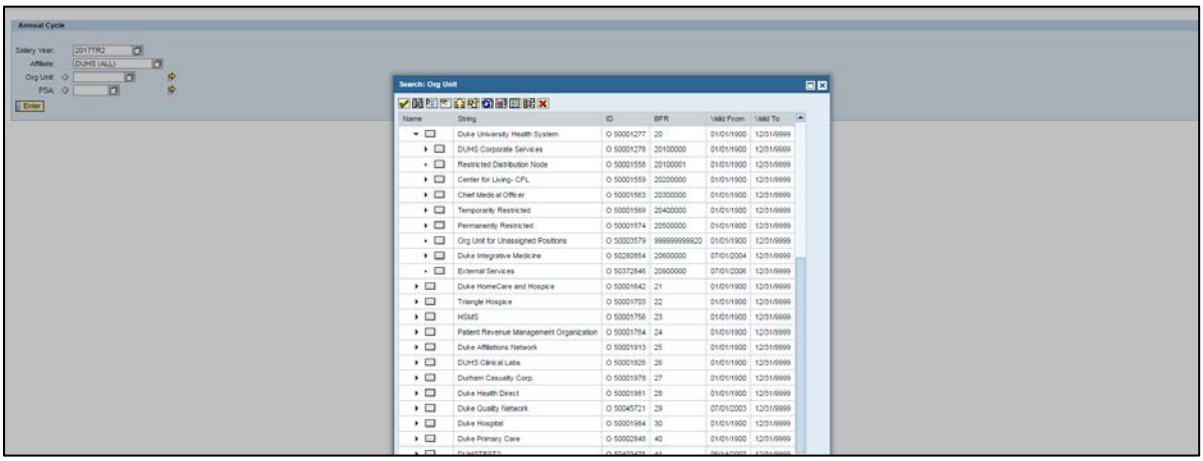
3. Click on the **DUHS Compensation Salary Setting** link.

On the **Annual Cycle** screen:



1. Select the **Salary Year** by choosing the year from the drop down menu.
2. Select the **Affiliate** by choosing the division from the drop down menu.

3. Enter the eight-digit Organizational Unit number in the **Org Unit** field—OR—search for an Organizational Unit number as outlined below.
   - Click on the drop down button in the Org Unit field.
   - In the Search: Org Unit window, use the Expand Node arrows to open the levels of the Org Unit hierarchy.
   - Click through the hierarchy to find the Org Unit you will be working with. The organizations for which you can set salaries are determined by your payroll security access.
   - Once you have found the desired Org Unit, click once on the Org Unit number and then click on the **Continue (Enter)** button.

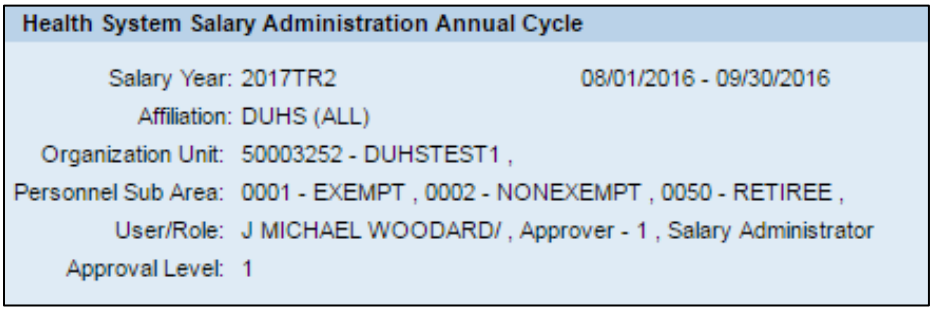


4. To choose **<u>all</u> Personnel Subareas**, leave the PSA field blank.
5. ***OPTIONAL:*** Select a **Personnel Subarea (PSA)** by choosing a PSA from the drop down menu.
6. Click the **Enter** button.

NOTE: When you select a PSA (or multiple PSAs) in an Org Unit, this action will "lock" the PSA from other users working with it while you are working with it. This locking function is set at the PSA level. This means that one user could be working with one PSA from an Org Unit, say Nonexempt, while another user works with a separate PSA, say Exempt.

On the *Health System Salary Administration Annual Cycle* screen:

<u>Upper Left</u>

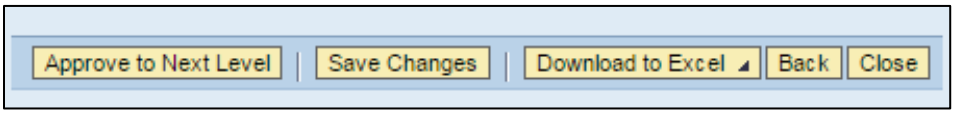


This section of the screen shows selection criteria from the Annual Cycle screen and other information as follows:

- **Salary Year =** Salary Year and DUHS Entity
- **Affiliate =** Entity designation
- **Organizational Unit =** eight-digit (HR/PR) Organization Unit number and name
- **Personnel Subarea =** List of Personnel Subareas selected and displayed
- **User/Role =** Your user name; your role in the Salary Administration portal
- **Approval Level =** Level of current approval:
  1=Salary Administrator-User verifies performance ratings, uses Exceptions to verify Include/Exclude status, approves to Level 2;
  2=Entity Approver-User reviews work of Salary Administrator in Level 1, approves to S&P;
  S&P=Summary and Planning-HR users calculate salaries;
  FR=Final Review-Salary Administrators and Entity Approvers review Employees, may use Exclude function and add Comments;
  S=Submit Updates-Payroll users upload and process all data;
  P=Processed-Salary Administrators and Entity Approvers review, identify Load Errors.

Function Buttons

Clicking the function buttons will perform various tasks or show helpful information.



1. **Approve to Next Level:** Use this button to submit the new salaries to the next level for approval. Once Salary Administrators approve new salaries to the next level, they cannot edit the salary information.
   NOTE: This button will only be available if you have accessed the Org Unit at the highest level in your entity. As a result, you must be working at the highest Org Unit level in order to approve to the next level.
2. **Save Changes:** Click to save entered data. After saving, review confirmation messages in the dialog box below the button. Users should save often.
3. **Download to Excel:** This button begins the process of downloading data from the Salary Setting tool to an Excel spreadsheet. For details on this process, see Appendix B.
4. **Back:** Returns to the Annual Cycle criteria selection screen without saving data.
5. **Close:** Closes the Salary Setting tool without saving data.

Grid

Default columns to view and input data for the employees chosen as follows.

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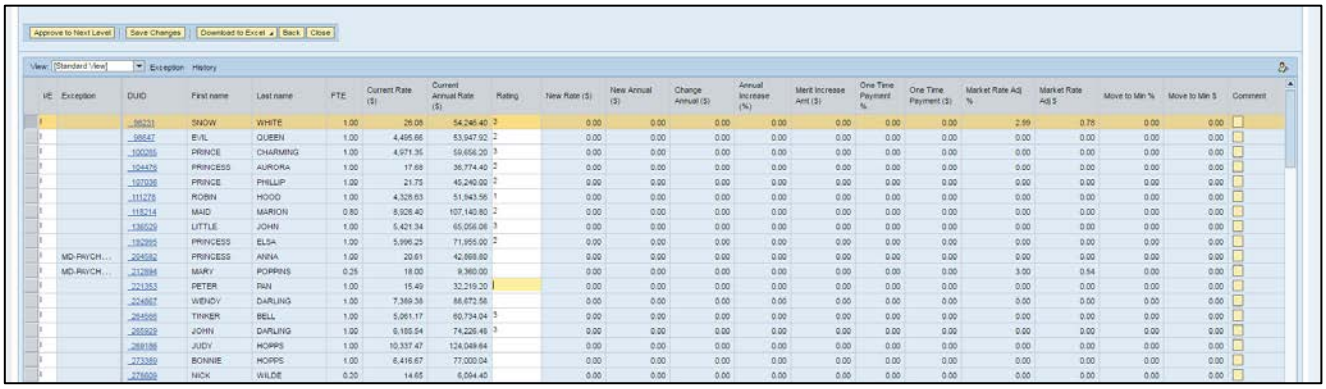
Note: The editable input columns are shown in white. You cannot enter or change data in the gray columns.



Approve to Next Level | Save Changes | Download to Excel | Back | Close

View: Standard View | Exception | History

I/E	Exception	DUID	First name	Last name	FTE	Current Rate ($)	Current Annual Rate ($)	Rating	New Rate ($)	New Annual ($)	Change Annual ($)	Annual Increase (%)	Merit Increase Amt ($)	One Time Payment %	One Time Payment ($)	Market Rate Adj %	Market Rate Adj $	Move to Min %	Move to Min $	Comment
I		98231	SNOW	WHITE	1.00	26.08	54,246.40	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2.99	0.78	0.00	0.00	
I		98647	EVIL	QUEEN	1.00	4,495.66	53,947.92	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		100285	PRINCE	CHARMING	1.00	4,971.35	59,656.20	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		104475	PRINCESS	AURORA	1.00	17.68	36,774.40	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		107036	PRINCE	PHILLIP	1.00	21.75	45,240.00	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		111275	ROBIN	HOOD	1.00	4,328.63	51,943.56	1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		118214	MAID	MARION	0.80	8,926.40	107,140.80	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		136529	LITTLE	JOHN	1.00	5,421.34	65,056.08	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		192995	PRINCESS	ELSA	1.00	5,996.25	71,955.00	2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I	MD-PAYCH...	204582	PRINCESS	ANNA	1.00	20.61	42,868.80		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I	MD-PAYCH...	212884	MARY	POPPINS	0.25	18.00	9,360.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.00	0.54	0.00	0.00	
I		221353	PETER	PAN	1.00	15.49	32,219.20		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		224067	WENDY	DARLING	1.00	7,389.38	88,672.56		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		264566	TINKER	BELL	1.00	5,061.17	60,734.04	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		265929	JOHN	DARLING	1.00	6,185.54	74,226.48	3	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		269186	JUDY	HOPPS	1.00	10,337.47	124,049.64		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		273389	BONNIE	HOPPS	1.00	6,416.67	77,000.04		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
I		276029	NICK	WILDE	0.20	14.65	6,094.40		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Editable Columns

- **I/E –** Selecting "E" will Exclude the employee from the salary setting process. The employee's data will appear on the grid, but no salary setting action will take place. For instance, an employee who was recently hired may not be eligible for a salary increase at this time and should be excluded. Some employees will be excluded based upon Exceptions, such as Terminations that are in process or zero rates of pay.
  "I" indicates that the employee will be included in salary setting action.
  NOTE: If you wish to Include or Exclude an employee, you <u>MUST</u> press the <u>Enter</u> key on keyboard after making the change. Failing to press the Enter key will result in the change not being accepted.
- **Rating** – the input column for the employee's performance rating. Ratings from the Performance Management Tool will appear in this column when the report is opened the first time.
- **Comment –** Clicking on the gray square will allow you to enter a comment about this line item. Comments are limited to 140 characters.

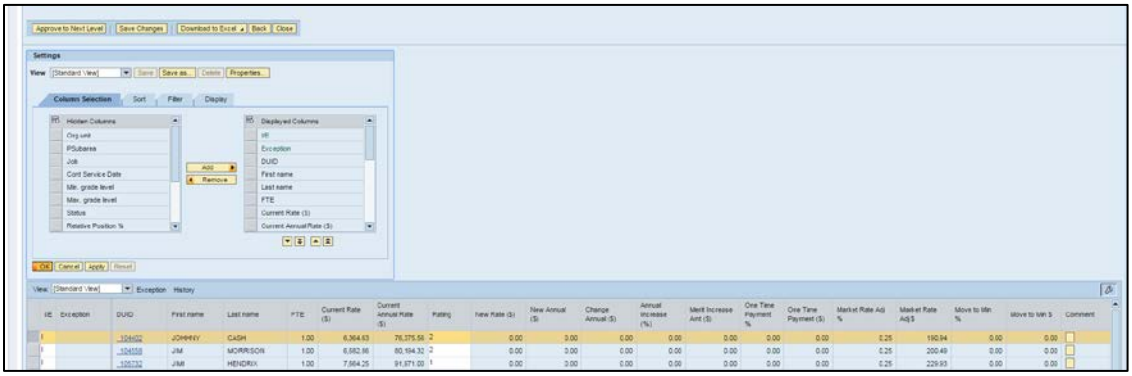
Information Columns (Non-Editable)

- **Exception –** This column will indicate if the employee has an Exception that requires detailed review during the Salary Setting process and may result in the person being excluded from Salary Administration processing. NOTE: A full list of Exceptions is included in this guide as Appendix A.
- **DUID** – the **Duke Unique ID** for the employee.
- **First Name**
- **Last Name**
- **FTE** – shows the percent full time equivalency, based on the work schedule.
- **Current Rate ($)** – the monthly or hourly rate of pay for the current salary year.
- **Current Annual Rate ($)** – the employee's current annual salary.
- **New Rate ($)** – the new monthly or hourly rate.

- **New Annual ($)** – the new total annual salary amount. Non-Exempt salaries equal the hourly rate times 2080 hours.
- **Change Annual ($)** – the amount in dollars between Current Annual and New Annual.
- **Annual Increase (%)** – the percentage change between Current Annual and New Annual.
- **Merit Increase Amt ($)** – the amount in dollars of the salary change attributed to a Merit Increase based on the employee's Rating.
- **One Time Payment ($)** – the amount in dollars of the salary change attributed to a One Time Payment.
- **Move to Min % –** The percentage of current salary needed to move the salary to the minimum for the range.
- **Move to Min $ –** The total dollars needed to move the salary to the minimum for the range.

Additional Columns

Additional columns may be added to the grid by clicking on the Open Settings Dialog box.



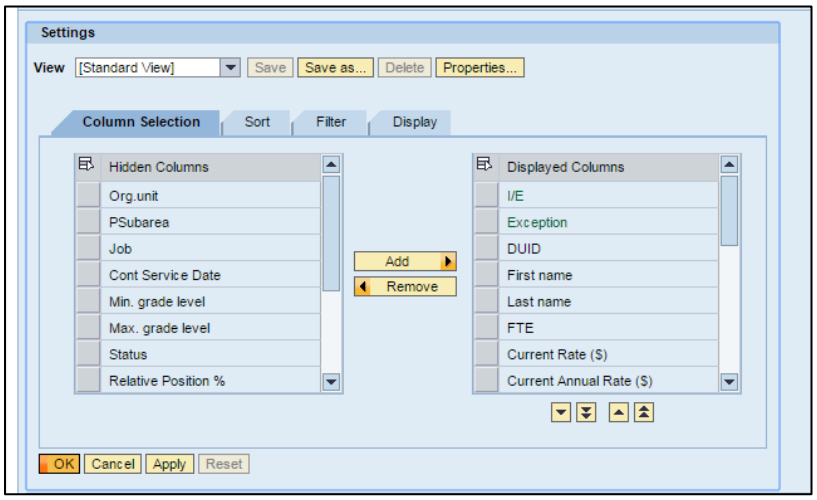
These columns include:

- **Org. Unit** – Number of the Organizational Unit.
- **PSubarea** – Personnel subarea.
- **Job** – Four-digit job code number.
- **Cont Service Date** – The employee's Continuous Service Date.
- **Min. grade level** – minimum hourly rate or annual amount for the job.
- **Max. grade level** – maximum hourly rate or annual amount for the job.
- **Relative Position %** - indicates the percentage of the new salary within the position salary range.

- **BFR Number –** The ten-digit BFR number assigned to the Org Unit.
- **Org Description** – name of the Organizational Unit.
- **P.subarea text** (Personnel Subarea text) – name of the Personnel Subarea.
- **Position Budget** – The amount for the New Annual salary budgeted in, and imported from, the budget tool.
- **Market Rate Adj $ –** The total dollars needed to move the salary to a determined market rate.
- **Job Level** – level of the job.
- **Market Rate Adj % –** The percentage of current salary needed to move the new salary to a determined market rate.

Adding or Deleting Columns

1. Click on the **Open Settings Dialog** box.



2. In the **Settings** window, review the **Hidden Columns** and the **Displayed Columns**.

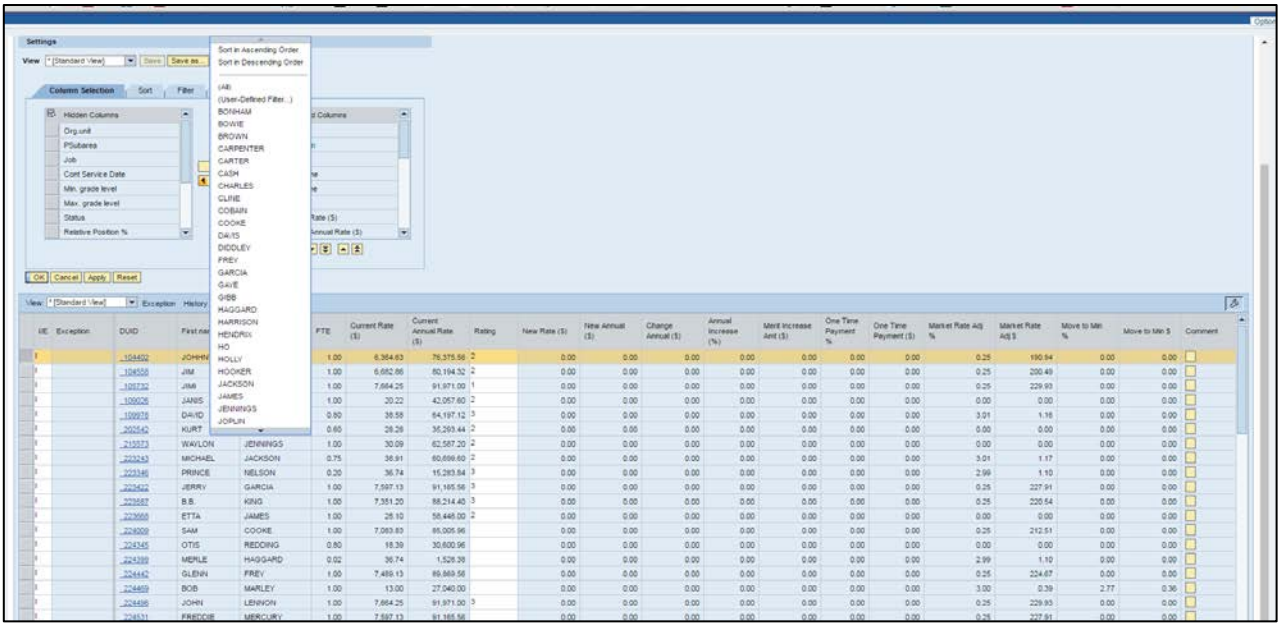
   NOTE: The first two Displayed Columns on the grid are fixed in place and cannot be removed. They are designated with green text.

3. Select the **Hidden Column** you wish to move onto the grid by clicking on the button to the left of its name. Holding the Shift key will allow you to select a group of consecutive columns. Holding the Ctrl key will allow you to select a group of non-consecutive columns.
4. To select the location of the added column on the grid, select the **Displayed Column** you wish to appear to the right of the added **Hidden Column**.
5. Click on that **Displayed Column**'s button.
6. Click on the **Add** button in the center. Notice that the **Hidden Column** has moved to the **Displayed Column** list.

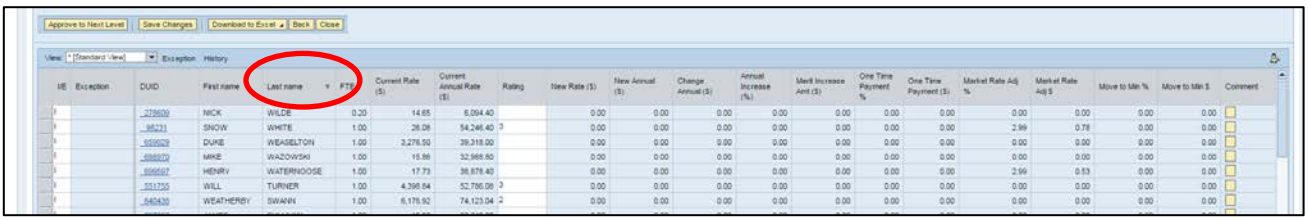
7. Click the **Apply** button. Notice the placement of the added column on the grid.
8. Select the **Displayed Column** you wish to remove from the grid by clicking on the button to the left of its name. Holding the Shift key will allow you to select a group of consecutive columns. Holding the Ctrl key will allow you to select a group of non-consecutive columns.
9. Click on the **Remove** button in the center. Notice that the **Displayed Column** has moved to the **Hidden Column** list.
10. Click the **Apply** button.
11. If this view is one you like and plan to use again, you may save it by clicking the **Save as…** button, naming it in the **Save View as** box, and clicking **OK**. You may return to this new view by selecting it from the **View** menu.
12. Close the **Settings** window by clicking on the **Close Settings Dialog** button.

Sorting and Filtering Columns

1. Click on the desired column heading you wish to sort or filter.



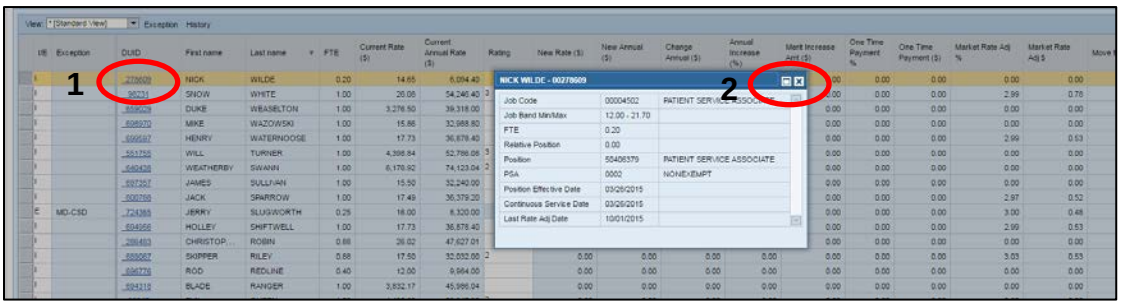
2. From the resulting menu, select the sort you wish to use, **Ascending Order** or **Descending Order**.
3. From the column heading menu, select the item you wish to filter on. Notice the funnel icon appears in the heading column.



4. To remove the filter, click on the menu and select **(All)**. The column will now show all the values in that column based on the original search.

To see employee details

1. Click on the DUID corresponding to the employee.



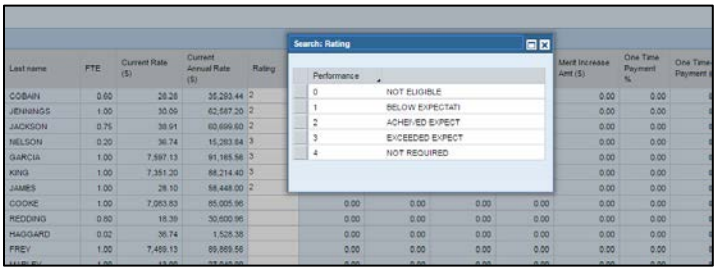
2. When you have finished reviewing the data in the window, click on the X in the upper right hand corner.

To change performance ratings:

Ratings from the Performance Management Tool will appear in the Rating column when the report is opened the first time.

Your task will be to verify that the ratings are populated and correct. If a rating is missing or incorrect, enter the value or make the change to the correct value.

1. Click in the **Review Rating** column for the desired employee.
2. Enter the rating in the field manually OR use on the drop down menu and select the correct rating:

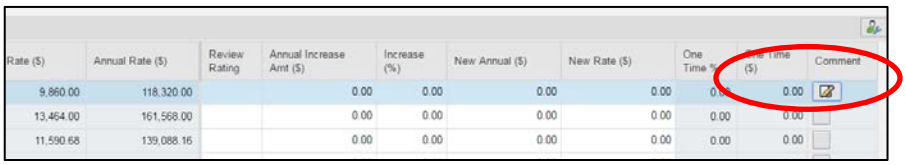


- 0: Not Eligible. Used for employees not eligible for performance ratings, such as new employees.
- 1: Below Expectations
- 2: Achieved Expectations
- 3: Exceeded Expectations

- 4: Not Required. Some employees are not required to be rated using this scale.

To add a note:

1. Click on the gray button in the Comment column on the line where you wish to add a note. Comments are limited to 140 characters.
2. In the resulting Comments screen, enter the note and click on the **Save** button. Notice that the Comments box now has a pencil-and-paper icon.



Rate ($)	Annual Rate ($)	Review Rating	Annual Increase Amt ($)	Increase (%)	New Annual ($)	New Rate ($)	One Time %	One Time ($)	Comment
9,860.00	118,320.00		0.00	0.00	0.00	0.00	0.00	0.00	
13,464.00	161,568.00		0.00	0.00	0.00	0.00	0.00	0.00	
11,590.68	139,088.16		0.00	0.00	0.00	0.00	0.00	0.00	

3. To delete a note, open the note and delete the text. Then click Save. The pencil-and-paper icon will disappear after you save changes and return to the view again.

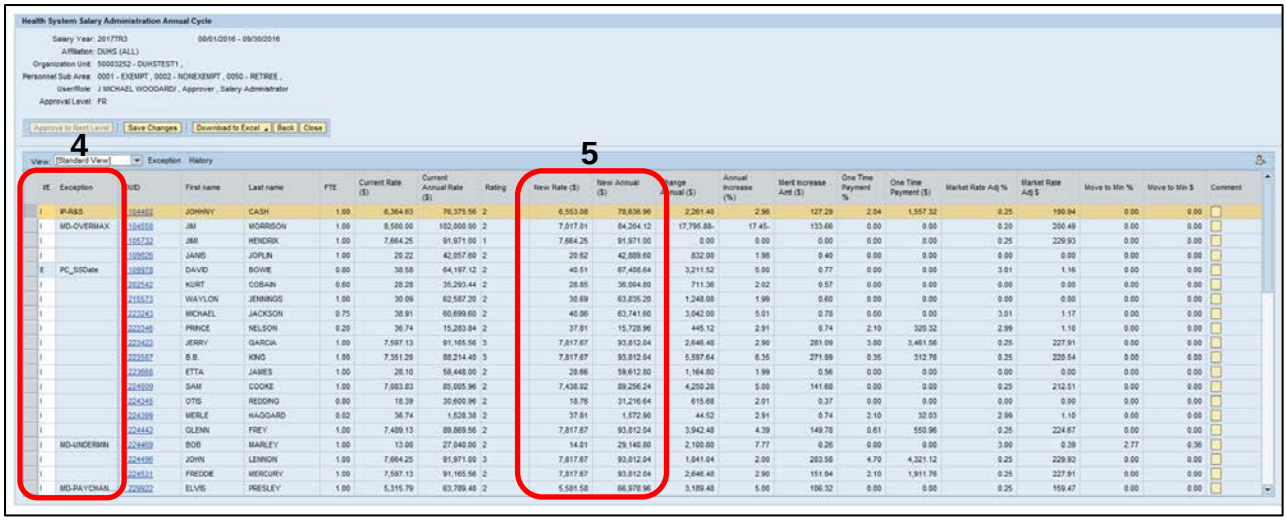
To approve to the next level

1. After reviewing the Performance Rating data, make sure any data changes are saved.
2. Click the Approve to Next Level button.
3. To log out of the Salary Administration screen, click the Close button.

Duke Health: Salary Administration

To verify and take corrective action after salaries are calcualted (Final Review)

In mid-September, Salary Administrators and Entity Approvers will be notified that salaries have been calculated. They should return to the Salary Administration tool and check for Exception messages. They should determine any errors that have been processed so that corrective action can be taken.



Note: In this Final Review stage, Salary Administrators may only use the Include/Exclude function and add Comments.

To perform this check:

1. Log in to the Duke@Work website—**work.duke.edu**—using your NetID, password, and multi-factor authentication.
2. Click on the **DUHS Compensation** tab.
3. Click on the **DUHS Compensation Salary Administration** link.
4. Check the **Exception** column. An explanation of Exception codes can be found in Appendix A.
5. Review new salary rates to confirm accuracy.
6. If you identify any corrective action that must be taken, submit the appropriate iForm or Payroll transaction.
7. Contact Rewards and Recognition if you have questions or need assistance.

To verify and take corrective action after files are loaded (Processed)

In late September, Salary Administrators and Entity Approvers will be notified by email that salaries have processed. They should return to the Salary Administration tool and check for Payroll Load Exception messages. They should determine any errors that have been processed so that corrective action can be taken.

Note: In this Processed stage, Salary Administrators may not make any changes. Any corrections must be submitted using iForms.

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To perform this check:

1. Log in to the Duke@Work website—**work.duke.edu**—using your NetID, password, and multi-factor authentication.
2. Click on the **DUHS Compensation** tab.
3. Click on the **DUHS Compensation Salary Administration** link.
4. Check for Payroll Load Exception messages, which will be designated by an Exception Code beginning with the letters “PO.” An explanation of these codes can be found in Appendix C.
5. If you identify any corrective action that must be taken, submit the appropriate iForm or Payroll transaction.
6. Contact your Management Center if you have questions or need assistance.

APPENDIX A: Exceptions

For the open Salary Setting cycle, each employee's master data file will be analyzed for certain criteria that may exclude him or her from Salary Setting for various reasons.

The process for determining Exceptions will run periodically. When an Exception is detected, a record will be created with an Exception code in the second column of the Salary Setting grid. Since only one Exception code will display, the messages below are listed in priority. Additionally where the tool includes or excludes (I or E) the employee from the salary load and whether or not that can be changed by the administrator (Y or N) is also included.

The list of Exceptions includes the following:

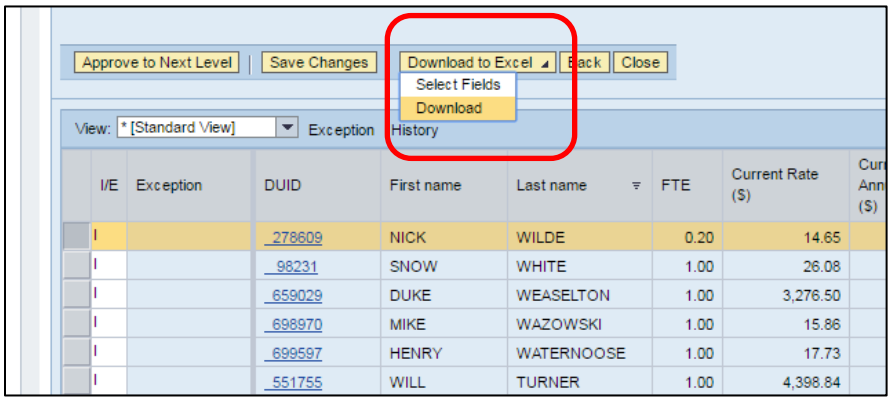
Code	Exception	Default	Edit Default	Action Required
MANUAL	Manual Change for Salary Setting	I	Y	Display anytime a salary setting administrator decides to exclude a person.
PC_SSDATE	Pay Change on Salary Setting Effective Date	E	N	Employee has a future dated pay change that is effective **ON** the Salary Setting effective date, October 1. This record will not load. Complete an iForm after Salary Setting loads if a change is necessary.
IP-TERM	In-Process iForm – Termination	E	Y	An in-process Termination iForm exists for the employee. The row is defaulted to Exclude, has a gray highlight, and cannot be edited.
MD-CSD	Continuous Service Date < 3 months	E	Y	Continuous Service date is less than three months. In most cases, employees in the probationary period are not eligible for salary administration. The row is defaulted to Exclude but may be Included using the I/E function
MD-OVERMAX	Annual Pay >= range maximum	I	Y	Employee's pay is greater than or equal to the range maximum.
FD-Transfer	Future Dated Transfer	I	Y	Employee has a Transfer with a future effective date greater than the Salary Setting effective date.

MD-UNDERMIN	Annual Pay under range minimum	I	Y	Employee's pay is BELOW the pay grade level lower limit. The system will automatically calculate the Move to Minimum increase component.
FD-PAYCHANGE	Future Dated Pay Change	I	Y	Employee has a future dated pay change that is effective **AFTER** the Salary Setting effective date, October 1. This record will be overlaid by Salary Setting. The user may choose to change the person's row to Exclude in order to keep the pay change in place —OR— Include to set the salary using Salary Setting. If you choose to use salary setting to set the salary, please submit another iForm to adjust the rate again on the effective date of the change after October 1. Message only displays if future dated change is within 30 days of the salary setting start date. File will overwrite pay changes greater than 30 days out, but exception message does not display.
IP-R&S	In-Process iForm – Rate & Schedule	I	Y	Employee has a pending iForm that MAY change pay. The user may display the form by selecting the row, clicking the Exception button to launch the Exception Details window, and clicking on the iForm link.
IP-TRANSFER	In-Process iForm – Transfer	E	Y	Employee has a pending Transfer iForm. The user may display the form using the exception details window.
MD-CSDPRO	CSD < 6 months (Prorated Increase)	I	Y	Employee's continuous service date is after the probationary ends, but not more than six months with respect to the cycle effective date, October 1. Most employees falling into this category will receive half of the merit increase.
MD-JOBCHANGE	Job Code Change in the past six months	I	Y	Employee has a job code change sometime in the prior six months.

MD-PAYCHANGE	Pay Change in the past six months	I	Y	Employee has a pay change that occurred sometime in the prior six months.
MD-LEAVE	Employee is on unpaid leave.	E	N	Employee is in an inactive status due to an unpaid leave of absence.
FD-TERM	Future Dated Termination	E	Y	Employee has a future dated termination action.
FD-LEAVE	Future dated unpaid leave	I	Y	Employee will become inactive at some future date.
PG Level Out of sync	Pay Grade Cycle Out of Synch	I	Y	Employee's Base Pay Grade Level is out of sync with the Job Code Pay Grade Level
PS/PG Type out of sync	PS/PG Type out of sync	E	Y	Employee's base pay "pay scale type" is inconsistent with the Job Code planned compensation pay grade type; therefore pay range is not correct. Investigate and work with Rewards and Recognition.
MD-PC-SSC	Pay change during salary setting	I	Y	Pay change occurring during the salary setting cycle. Should be investigated to determine impact.

APPENDIX B: Downloading Data Using a Spreadsheet

1. Select the desired criteria and execute the report on Administration Annual Cycle.
2. Click the Download to Excel button and choose Select Fields from the menu.



3. Open the export file that was downloaded.

APPENDIX C: Payroll Load Exception Messages

Once the Salary Setting file is loaded into SAP, access the Salary Setting Tool in Duke@Work to confirm that all changes are appropriate. You will notice the status column has changed to "P" indicating "Processed". Exception messages may appear and may require action. Below is a list of the exception messages and the required action.

Code	Exception	Action Required
PO-WITHDRAWN	No update was made because the employee is withdrawn after salary setting closed.	No action required.
PO-INACT	A failure occurred while attempting to update an employee who is Inactive.	No action required unless employee impacted should be active. Process an iForm to correct status and an iForm to correct rate if necessary.
PO-Zero	New Rate is Zero	Notify the appropriate Management Center.
PO-TRANSFER	No update was made because the employee transferred after salary setting closed	Review impact and process an iForm to correct if necessary.
PO-LOCK	A failure occurred while attempting to update an employee whose employee record is locked.	Review impact and process an iForm to correct.
PO-0008	A failure occurred while attempting to update the employee's Base Pay record	Review impact and process an iForm to correct if necessary.
PO-9001	A failure occurred while attempting to update the employee's Secondary position pay.	Consult with Duke Central HR compensation.
PO-00041	A failure occurred while attempting to update the employee's Date specification record.	Consult with Duke Central HR compensation.
PO-LUMPSUM	No One Time Payment was uploaded due to a failure.	Consult with Duke Central HR compensation.
PO-NEWORG	Transfer Outside of Affiliate	Consult with Duke Central HR compensation.
PO-N08	No update was made because the employee has no active base pay record.	Consult with Duke Central HR compensation.
PO-PAXFR	Payroll Area Changes	Review impact and process an iForm to correct.