

# SOP for Shared Salaries Process

**Goal of Shared Salaries Process:** To provide Departments with a tool that will encourage communication and cooperation in the Shared Salaries process in Salary Planner. This, in turn, will help to reduce the number of indices thrown out of balance because of changes to Shared Salaries that are not previously agreed upon between Shared Orgs and Home Orgs.

## SOP Definitions:

**Shared Org** is a department who pays for salaries of employees outside of their organization.

**Home Org** is the hiring organization for an employee. In Salary Planner, only the Home Org can input or update the labor distribution for employees with labor distributions to multiple indices under multiple organizations.

## Late January:

All HSC Departments will be provided with a list of Salary Planner Contacts for each HSC department. This list will contain the names and contact information of those individuals responsible for insuring that Shared Salaries will be agreed upon and entered into Salary Planner according to the agreements reached through the following Shared Salaries Process. This list will come from either the HSC Budget Office or the School of Medicine Dean's Office dependent on your Org.

## Late January:

The designated individuals on the Contact List will run a new report for their organization. This new report, "FSRSLSH-HSC\_SHARED\_SALARY", is in the "F HSC Reports" folder in MyReports. This report produces an Excel document that will serve as an editable template for Shared Orgs (Departments who pay for salaries of employees outside their Organizations) and Home Orgs to communicate Shared Salary information between themselves. This template will list all of the employees who are not employees of the Shared Org, but who currently have some portion of their salaries paid for by the Shared Org. Also on this template are columns that will need to be completed by both the Shared Orgs (Columns M through P) and the Home Orgs (Columns R through U).

## SOP for Running the Shared Salary Report from MyReports:

1. Open MyReports. (Response time varies dependent upon Browser used.)
2. Open the "F HSC Reports" folder.
3. Select "FSRSLSH-HSC\_SHARED\_SALARY" report.
4. Select the LEVEL of Organization for your Org (most Departments will choose Level 5.)

https://myreports.unm.edu/?BIP\_REQUEST\_TYPE=BIP\_RUN&BIP\_folder=IBFS%253A%252FWFC%252FRRepository - Internet Explorer provided by

# MyReports

myreports.unm.edu

## FSRSLSH - HSC Shared Salary Report

Report Criteria:

| SEGMENT      | LEVEL   | WILD  |
|--------------|---------|-------|
| ORGANIZATION | LEVEL 5 | 043a* |

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- In the box labelled "WILD", enter your Organization Code in front of the asterisk (\*). (If you enter the Org Code after the asterisk, you will get an error message.)
- Select your Org Code by clicking the Right Arrow button or pressing Enter.

https://myreports.unm.edu/?BIP\_REQUEST\_TYPE=BIP\_RUN&BIP\_folder=IBFS%253A%252FWFC%252FRRepository - Internet Explorer provided by

# MyReports

myreports.unm.edu

## FSRSLSH - HSC Shared Salary Report

Report Criteria:

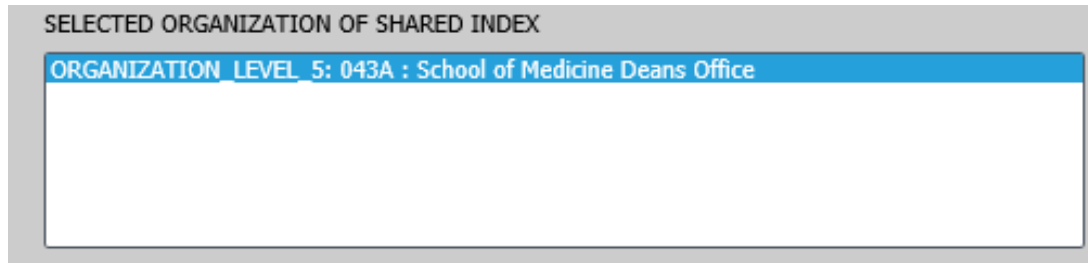
| SEGMENT      | LEVEL   | WILD  |
|--------------|---------|-------|
| ORGANIZATION | LEVEL 5 | 043a* |

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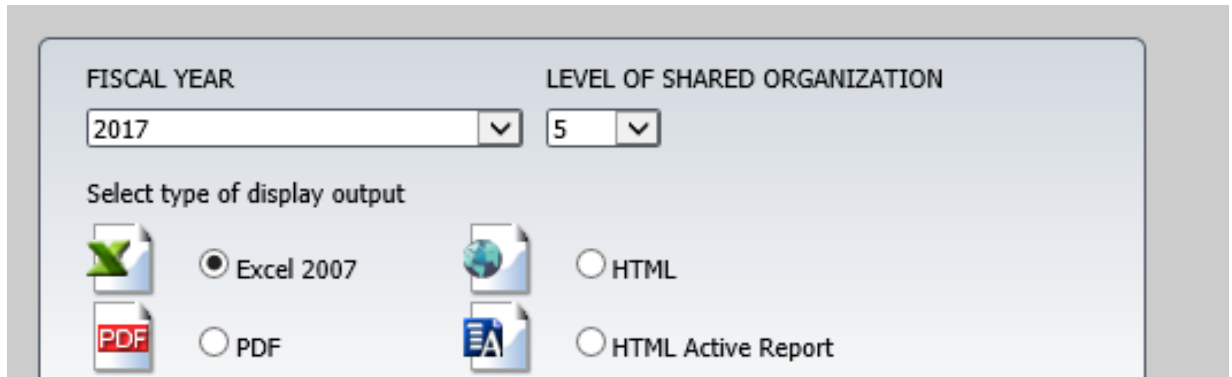
- Your Org's information should then show in the next box.

| Organization | Description                            | Level |
|--------------|--|-------|
| 043A         | 043A : School of Medicine Deans Office | 5     |

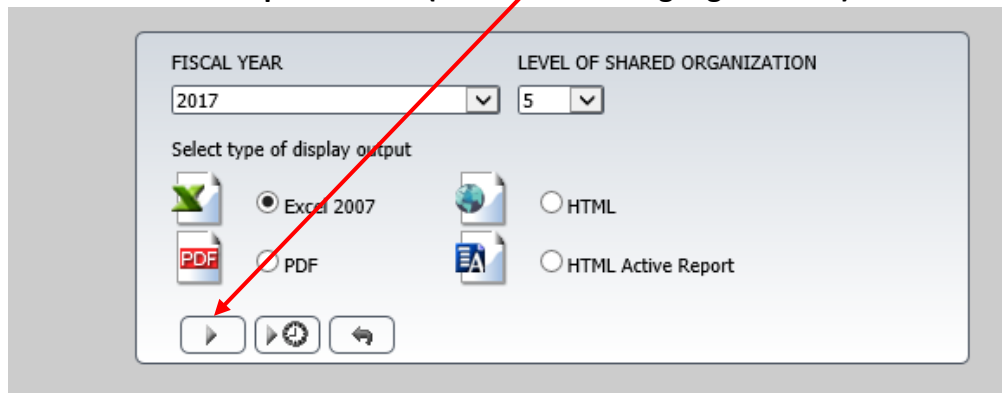
- When your Organization Code populates in this box, click on your Org Code (reflected in blue lettering). Doing so will cause your Org Code's information to populate the next box titled "SELECTED ORGANIZATION OF SHARED INDEX".



9. In the next box on the screen, Select the current Fiscal Year from the drop down list.

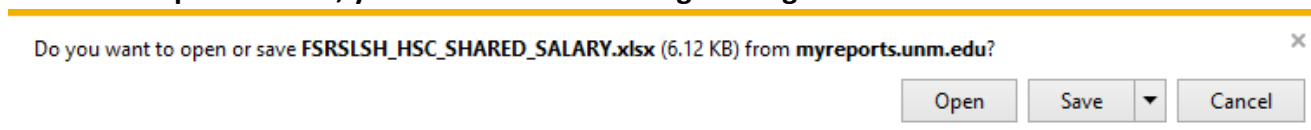


- 10. The drop down list under “LEVEL OF SHARED ORGANIZATION” allows you to choose further detail in your report. Most Organizations will choose “5”.
- 11. Leave the pre-selected Display Output as an Excel 2007 document, as you will need to edit the information in columns M through P after the Excel report has generated.
- 12. Click on the Run Report button (button containing Right Arrow).



The report takes several seconds to run, so please be patient.

13. When the report has run, you will see the following message:



14. Select “Open”.

15. Save the Excel report to a file name in this format: FY[Current Fiscal Year] Shared Salaries of [Your Org's Name] – Org [Your Org's Org Code].xlsx. (Example: FY17 Shared Salaries of SOM Deans Office – Org 043A.xlsx)

### First and Second Weeks of February:

Shared Orgs will review this template and make changes or additions to the template that will then reflect their intention to budget these employees' salaries in Salary Planner for the upcoming fiscal year. (These changes by the Shared Org will be recorded in columns M through P of the template.)

After finalizing the template, the Shared Orgs will send their revised template spreadsheets to the Contact Person(s) in the Home Orgs of the shared employees by **the end of the second week in February.**

### Third and Fourth Weeks of February:

Contact Person(s) in the Home Orgs will review the Shared Orgs' revised template, and will communicate either agreement or disagreement with the Shared Orgs' intention to budget these employees.

If there is agreement, the Home Org will indicate so on the template (columns R through U), and will return a copy of the template to the Shared Org by **the end of the third week in February.**

If there is disagreement with the Shared Orgs' intention to budget these salaries, the Home Org will contact the Shared Org to negotiate the budgeting of these employees **within one week of receipt of the template from the Shared Org.**

It is the expectation that the Home Org and Shared Org will be able to come to agreement on the majority of the disputed employees' salaries **within two weeks of receipt of the template from the Shared Org,** and that the Home Org will return the finally agreed upon template to the Shared Org **not later than the last business day in February.**

If agreement cannot be reached on some of the employee(s), the Home Org should indicate its agreement for the rest of the employees on the template, and note that it is still not in agreement on the remaining disputed employee(s). The Home Org will then return this template to the Shared Org by the close of business on **the last business day in February.**

### From the Last Day in February through the Opening of Salary Planner:

The Home Org and Shared Org will continue negotiations on those employees not previously agreed upon. If agreement is reached, the Home Org will enter the agreement on the most recently agreed upon template, and will send a copy of it to the Shared Org.

If agreement cannot be reached at this point for any disputed Shared Salaries, the Home Org will communicate this via a final updated template to the Shared Org **by the opening date of Salary Planner.**

### **Early- to Mid-March (Opening of Salary Planner):**

The Home Org is responsible for entering the agreed upon salary information into Salary Planner from the most recently revised template that has been communicated to the Shared Org.

**Home Org Accounting Leads or Department Administrators (those on the Contacts list) need to communicate with their Budget Planner/Salary Planner data entry teams the information shown on the template to insure that only the agreed upon salary data is entered for the shared employees, and that no changes to these employees will occur after the agreed upon salary data is entered.**

Please refer to the Shared Salaries data entry deadline for your College, School, or Unit on the Budget Development Calendar, which is located at the following HSC Budget Office site:

<http://hsc.unm.edu/financialservices/budget/budget-information.html>

### **From Mid-March through Mid-April:**

After shared salary updates have been made in Salary Planner, departments may request a second Shared Salary Report from the HSC Budget Office. (Please contact either Desiree Gathings ([DGathings@salud.unm.edu](mailto:DGathings@salud.unm.edu); 272-0904) or Joseph Wrobel ([JWrobel@salud.unm.edu](mailto:JWrobel@salud.unm.edu); 272-5664) each time that you want this report run.)

This second Shared Salary Report will be run from the Salary Planner tables in real- time, in the same way that the rest of the Salary Planner reports are run.

Departments should verify that these reports reflect the final agreed upon information for their shared salaries. If Shared Salaries are not recorded as agreed to, the Shared Org Contact Person will contact the Home Org Contact Person to advise the Home Org to correct.

### **After Budget Planner and Salary Planner Have Been Locked for All Departments (Mid- April):**

For those shared salaries still not agreed upon, negotiations should continue between the Home Orgs and Shared Orgs so that correct salary data can be entered into the HR/Payroll system as early in the new fiscal year as possible.