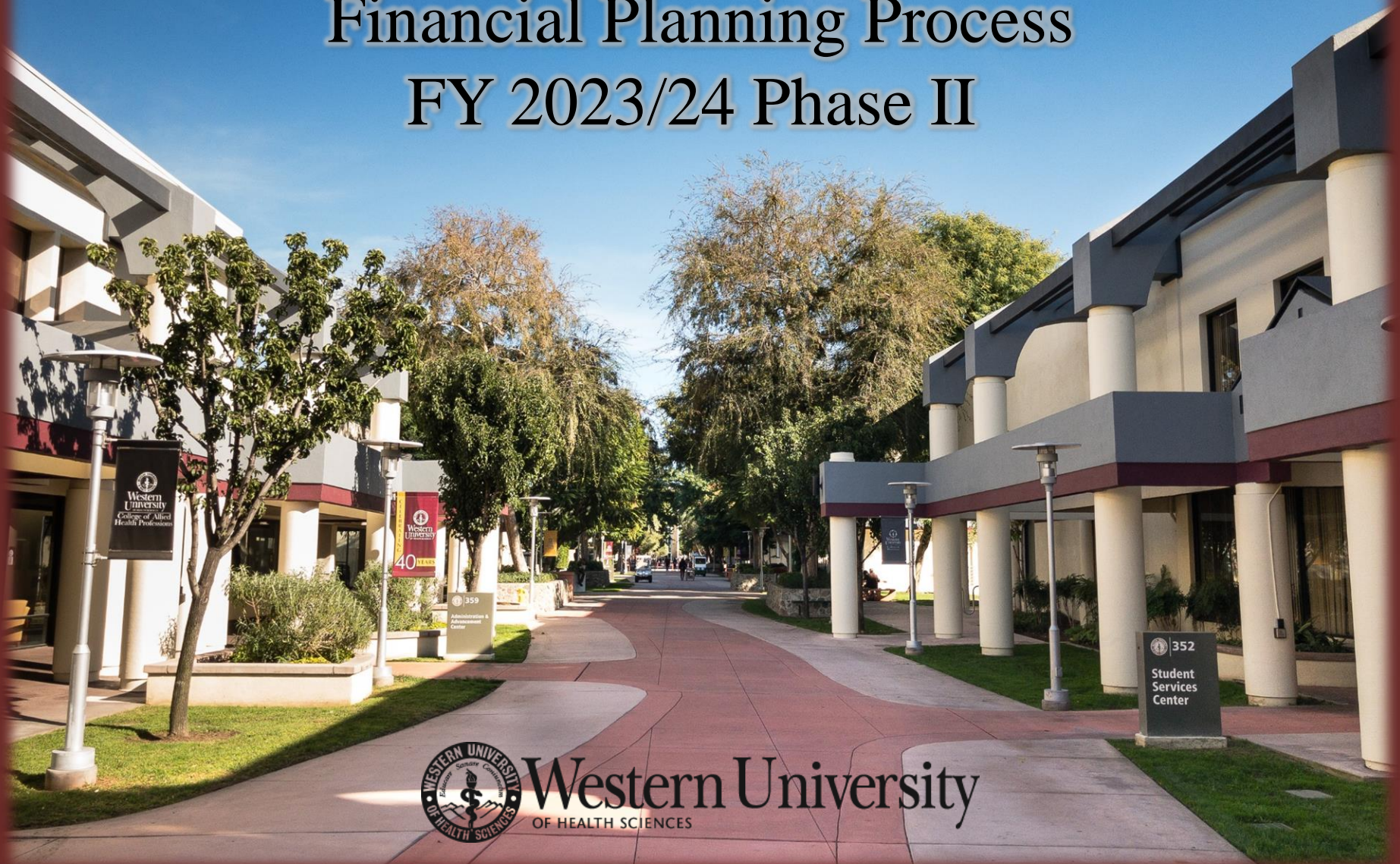


Financial Planning Process FY 2023/24 Phase II



Western University
OF HEALTH SCIENCES

Objectives



- Collaborative Communication Updates
- Salary Planning Guidelines
- Salary Budget Worksheets Overview

Salary Pool Increase Examples

	Salary & Wage Level	Economic Relief January 1, 2023	2% Salary Pool July 1, 2023	Total Increase (\$)	Total Increase (%)
Example 1	\$ 35,360	\$ 2,000	\$ 747	\$ 2,747	7.8%
Example 2	\$ 75,000	\$ 2,000	\$ 1,540	\$ 3,540	4.7%
Example 3	\$ 100,000	\$ 2,000	\$ 2,040	\$ 4,040	4.0%
Example 4	\$ 150,000	\$ 2,000	\$ 3,040	\$ 5,040	3.4%
Example 5	\$ 175,000	\$ 2,000	\$ 3,540	\$ 5,540	3.2%
Example 6	\$ 200,000	\$ 2,000	\$ 4,040	\$ 6,040	3.0%

- Six Month Period Salary Increase = Economic Relief + 2% Salary Pool Increase
- Above Items Listed on Table are Only Examples

Collaborative Communication



- Starting July 1, 2023, we will be using Workday Adaptive Insights for reallocating Operating and Capital Expenses.
 - » We will not be reallocating budget using BudgetPak before July 1st.
- FY 2024 Budget approved by Board of Trustees.
- All planning materials are in the W Drive.

Important Information and Dates

- 2% Annual Salary Pool Approved by Board
- Fringe Benefit Rate Remains the Same at 33.2%
- Provost Office Reminder: Faculty Contracts Deadline is May 31st
- Salary Budget Worksheets Deadline: May 19, 2023
- Economic Relief Deadline for Vacant Positions: June 30, 2023

Salary Pool Allocation Guidelines

- Salary pool increases may be allocated to employees hired prior to April 1st.
- Compensation budget may be reallocated from vacant positions and unused lines.
- Compensation budget may be reallocated across organizational units within the same department/college.
- Compensation budget from faculty accounts may not be moved to admin accounts.
- Provide notes for each fund movement (from and to) in the comment column under the salary budget worksheets.
- Submit a corresponding PeopleAdmin request for all modifications prior to submitting salary budget worksheets.
 - Provide in the comment column a submission date and PA action number if available.
- 6% and over salary increases will require PeopleAdmin modification and review by HR.

Salary Budget Worksheets Overview

- Review and Validate all Information
 - Snap-Shot as of March 20, 2023
- Allocate Annual Salary Pool Increases
- Record PeopleAdmin Position Modifications
 - Include PA Action # in Comments Column
- Reconcile and Balance within Allotted Amounts



Salary Budget Worksheets

- Identify and allocate all salary increases in the Salary Budget Worksheets.

* Please remember that the total amount of all salary pool increases cannot exceed the total amount allotted.

- If any discrepancies on the Salary Budget Worksheets, please reach out to Budget@westernu.edu.

- Verify that the salary amount on the faculty contract matches the Salary Budget Worksheet.

Salary Budget Worksheets

- ❑ Salary Increases 6% and over will require Human Resources' review and approval.

- ❑ Hourly rates for non-exempt salaries must be rounded to two decimal places. For example:

\$24.04 hourly (rounded up) = \$50,003.20 annually

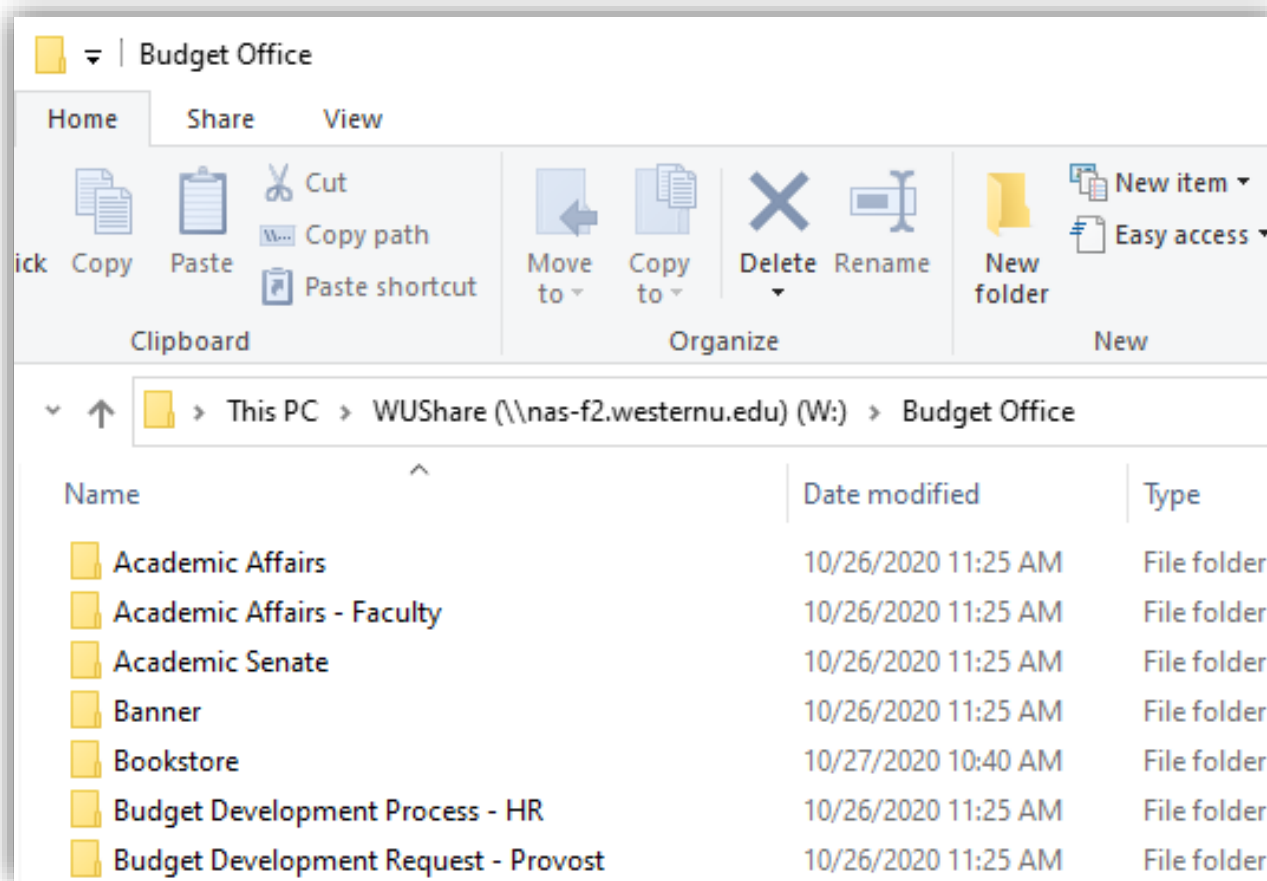
\$24.03 hourly (rounded down) = \$49,982.40 annually

- ❑ Reminder: All position increases funded by Designated, Grant, Federal Work Study, and Temporary Funds need to be processed via PeopleAdmin action form.

- ❑ For all position modifications, please process via PeopleAdmin and record on Salary Budget Worksheets.

Accessing Salary Budget Worksheets

Go to W:\Budget Office*Your Folder*



Completing the Salary Budget Worksheets

Western University of Health Sciences
Salary Worksheet - Org 1111
 For Fiscal Year Ending June 30, 2024

Instructions:

Please include any reallocations and salary pool increases. Also include all new positions and modifications to positions such as changes in account number, home org., title, promotions, FTE, and PCN movements between orgs. for each eligible employee within the highlighted areas. For new positions use empty rows located at the bottom of each section. For any questions please contact the Budget Office.

Position Control Number	Current Account Number	New Account Number	Employee Name or Title	Anticipated Hire Date	Current FTE	New FTE	Base Salary/Wage Level	Amount Reallocation	Amount Salary Pool Increase	% Salary Pool Increase	Amount of Total Increase	Total % Increase	2023-24 Proposed Salary Wage Level	Comments
123456	6200		Alvarez, Jana		1.000		74,000.00		2,123.14	2.87%	2,123.14	2.87%	76,123.14	
123457	6600		Smith, John		1.000		50,876.80		1,123.20	2.21%	1,123.20	2.21%	52,000.00	
123458	6600		VACANT		1.000		37,440.00	(6,760.00)		0.00%	(6,760.00)	-18.06%	30,680.00	Moved \$4,760 to PCN 123459
123459	6601	6600	VACANT		0.500		30,000.00	4,760.00	600.00	2.00%	5,360.00	17.87%	35,360.00	Moved \$2k to Org 11112, PCN 234568 PA Action #: S02864
			Enter New Position						Not Eligible	Not Eligible	-	-	-	
			Enter New Position								-	-	-	
					Salaries and Wages	3.500	\$ 192,316.80	\$ (2,000.00)	\$ 3,846.34		\$ 1,846.34	0.96%	\$ 194,163.14	
					Fringe Benefits		63,849.18	(664.00)	1,276.98					
					Salaries, Wages, and Fringe Benefits		256,165.98	(2,664.00)	5,123.32					
					Salary Pool Allotted				\$ 3,846.34					
Temporary, Federal Workstudy, and Honorariums/Adjunct														
			Enter New Position						Not Eligible	Not Eligible	-	-	-	
			Enter New Position								-	-	-	
					Salaries and Wages	-	\$ -	\$ -			\$ -		\$ -	
					Fringe Benefits		-	-						
					Salaries, Wages, and Fringe Benefits		\$ -	\$ -						
					Total Salaries and Wages (1100)	3.500	\$ 192,316.80	\$ (2,000.00)	\$ 3,846.34		\$ 1,846.34	0.96%	\$ 194,163.14	
					Total Fringe Benefits (1100)		63,849.18	(664.00)	1,276.98					
					Total Salaries, Wages, and Fringe Benefits (1100)		\$ 256,165.98	\$ (2,664.00)	\$ 5,123.32					
					Salary Pool Variance				\$ -					
Grants and Designated Funds														
			Enter New Position						Not Eligible	Not Eligible	-	-	-	
			Enter New Position								-	-	-	
					Salaries and Wages	-	\$ -	\$ -			\$ -		\$ -	
					Fringe Benefits		-	-						
					Total Salaries, Wages, and Fringe Benefits		-	-						

Completed by: Jane Alvarez
 Title: Budget Associate

Date: 4/21/23

All hourly rates on the non-exempt positions must only calculate to 2 decimal places when calculating the annual salary. Employees hired, promoted or had a salary increase during April 1st thru June 30th, are not eligible for the annual salary increase. Please indicate a planned sabbatical in the comments area.

Completing the Salary Budget Worksheets

Western University of Health Sciences
Salary Worksheet - Org 11112
 For Fiscal Year Ending June 30, 2024

Instructions:

Please include any reallocations and salary pool increases. Also include all new positions and modifications to positions such as changes in account number, home org., title, promotions, FTE, and PCN movements between orgs. for each eligible employee within the highlighted areas. For new positions use empty rows located at the bottom of each section. For any questions please contact the Budget Office.

Position Control Number	Current Account Number	New Account Number	Employee Name or Title	Anticipated Hire Date	Current FTE	New FTE	Base Salary/Wage Level	Amount Reallocation	Amount Salary Pool Increase	% Salary Pool Increase	Amount of Total Increase	Total % Increase	2023-24 Proposed Salary Wage Level	Comments
Operating														
234568	6200		Lawrence, Ralph		1.000		55,000.00	2,000.00	1,100.00	2.00%	3,100.00	5.64%	58,100.00	Moved \$2k from Org 1111 PCN 123458
			Enter New Position						Not Eligible	Not Eligible	-	-	-	
			Enter New Position								-	-	-	
			Salaries and Wages		1.000		\$ 55,000.00	\$ 2,000.00	\$ 1,100.00		\$ 3,100.00	5.64%	\$ 58,100.00	
			Fringe Benefits				18,260.00	664.00	365.20					
			Salaries, Wages, and Fringe Benefits				73,260.00	2,664.00	1,465.20					
			Salary Pool Allotted						\$ 1,100.00					
Temporary, Federal Workstudy, and Honorariums/Adjunct														
			Enter New Position						Not Eligible	Not Eligible	-	-	-	
			Enter New Position								-	-	-	
			Salaries and Wages		-		\$ -	\$ -	-		\$ -	-	\$ -	
			Fringe Benefits				-	-	-				-	
			Salaries, Wages, and Fringe Benefits				\$ -	\$ -	-				-	
			Total Salaries and Wages (1100)		1.000		\$ 55,000.00	\$ 2,000.00	\$ 1,100.00		\$ 3,100.00	5.64%	\$ 58,100.00	
			Total Fringe Benefits (1100)				18,260.00	664.00	365.20					
			Total Salaries, Wages, and Fringe Benefits (1100)				\$ 73,260.00	\$ 2,664.00	\$ 1,465.20					
			Salary Pool Variance						\$ -					
Grants and Designated Funds														
			Enter New Position						Not Eligible	Not Eligible	-	-	-	
			Enter New Position								-	-	-	
			Salaries and Wages		-		\$ -	\$ -	-		\$ -	-	\$ -	
			Fringe Benefits				-	-	-				-	
			Total Salaries, Wages, and Fringe Benefits				-	-	-				-	
Completed by: Jane Alvarez			Date: 4/21/23			<p>All hourly rates on the non-exempt positions must only calculate to 2 decimal places when calculating the annual salary. Employees hired, promoted or had a salary increase during April 1st thru June 30th, are not eligible for the annual salary increase. Please indicate a planned sabbatical in the comments area.</p>								
Title: Budget Associate														

Completing the Salary Budget Worksheets

Salary Worksheets Summary (Fund 1100)		
Org. #	Reallocation	Salary Pool
1111	\$ (2,000.00)	\$ 3,846.34
1112	\$ 2,000.00	\$ 1,100.00
Total from Worksheets	\$ -	\$ 4,946.34
Salary Pool Allotted		\$ 4,946.34
Variance		\$ -



Submitting Salary Budget Worksheets

- Please make sure all salary increases are reflected in the salary budget worksheets and email Budget@westernu.edu that your department has placed the completed worksheets in the W Drive.



ANY
QUESTIONS?

A photograph of a cream-colored sticky note with the words "Thank You" written in a bold, black, serif font. The note is placed on a rustic, light-colored wooden surface. A black fountain pen with gold accents is positioned diagonally to the right of the note. The entire scene is set against a dark red background that has a white L-shaped cutout on the left side.

**Thank
You**