TAMU Phase II - BPP Prep Salary Budget

Template Information/Instructions:
- Template populated with data April 29, 2015
- Update template for 9/01/2015 – template columns/column headers highlighted are the fields available for update, except for Pay Indicator
- Template changes will upload to Prep if a PIN and UIN combination on the template matches a PIN and UIN combination in Prep with no errors
  - New positions added after BPP rolls to prep cannot be modified in the template
  - If an employee moves to a new position after BPP rolls they cannot be modified in the template
- Pay indicator can be modified ONLY if updating from:
  - A (Monthly - Full Time) to B (Monthly - Part Time); B to A or;
  - D (Hourly - Full Time) to E (Hourly - Part Time); E to D
- Position actions available in template:

<table>
<thead>
<tr>
<th>Type of Action</th>
<th>Employ Name</th>
<th>UIN</th>
<th>Occupant Action Code</th>
<th>Position Action Code</th>
<th>Rec 1 Salary Action Code</th>
<th>Rec 2 Salary Action Code</th>
<th>Rec 3 Salary Action Code</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td></td>
<td></td>
<td>ME</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter new salary</td>
</tr>
<tr>
<td>Equity</td>
<td></td>
<td></td>
<td>EQ</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter new salary</td>
</tr>
<tr>
<td>Promote/ Demote Within</td>
<td></td>
<td></td>
<td>PW/DW</td>
<td>CT</td>
<td>PI/DE</td>
<td></td>
<td></td>
<td>Enter new title code and salary</td>
</tr>
<tr>
<td>Reclassify</td>
<td></td>
<td></td>
<td>RC</td>
<td>RC</td>
<td>PI/IN</td>
<td></td>
<td></td>
<td>Enter new title code and salary</td>
</tr>
<tr>
<td>Change Salary (Admin Change)</td>
<td></td>
<td></td>
<td></td>
<td>AD/CF</td>
<td></td>
<td></td>
<td></td>
<td>Enter new salary</td>
</tr>
<tr>
<td>Hiring Salary Adjustment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>HS</td>
<td></td>
<td></td>
<td>Enter new salary</td>
</tr>
<tr>
<td>Vacate</td>
<td>Vacant</td>
<td>999999999</td>
<td>VA</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Updates occupant as vacant but keeps the position</td>
</tr>
<tr>
<td>Vacate</td>
<td>Vacant</td>
<td>999999999</td>
<td>VA</td>
<td></td>
<td>EL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Voluntary Termination</td>
<td></td>
<td></td>
<td>VT</td>
<td>EL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Involuntary Termination</td>
<td></td>
<td></td>
<td>IT</td>
<td>EL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retire</td>
<td></td>
<td></td>
<td>RE</td>
<td>EL</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

ME-Merit; EQ-Equity; PW-Promote Within; DW-Demote Within; CT-Change Title; PI-Promote Within; DE-Decrerase; RC-Reclassify; IN-Increase; AD-Administrative Change; CF-Correction; EL-Eliminate; VT-Voluntary Terminate; IT-Involuntary Terminate; RE-Retire; VA-Vacate
• **Position actions not available in template**
  - Transfers In
  - Transfers Out
  - New Hire
  - Voluntary/Involuntary Terminations and Retires **NOT** being eliminated
  - Changing the pay indicator from an hourly code to a monthly code or vice versa
  - Any action requiring a change to a PIN and UIN combination in the template will result in an error
  - Adding a PIN and/or UIN to the template
  - Deleting a PIN’s record from the template will result in **NO** change to BPP Prep

• **Salary Recommendations**
  - Rec 1 - AD (updating to decrease or increase for a stipend); CF (correction)
  - Rec 2 – ME only
  - Rec 3 – equity (EQ); decrease (DE); promotion (PI); increase (IN)

• **Source Changes**
  - To delete a source line, highlight the row, right click and delete
  - To add a source line(s), copy an original source line for the PIN and then insert the copied cell

• **Reminders**
  - Updates in the template will attempt to load if there is a UIN and PIN combination in the template matching a UIN and PIN combination in BPP Prep
  - Only merit recommendations should be made in Rec 2 in the template or in **BPP Prep**
  - Change source title code if a position title code is changing
  - Rates entered in Rec 1, 2 and 3 should be hourly rates for hourly employees and monthly rates for monthly employees
  - Do not change the order of the columns
  - Data may be resorted, but sort the data back in the original format before submitting to the Budget Office. Sort should be based on Exec, Division, College, Department, PIN, Employee Name
  - Highest recommendation number (not largest salary recommendation) becomes Iteration “01” in Active Budget for the new fiscal year
  - When eliminating a position, do not change the source % effort to 0, the source percent efforts in total for a PIN should equal the position % effort!

• **Upload Responses**
  - **Error Report** – common examples of errors
    - Source % effort out of balance
    - Invalid accounting analysis code (**accounting analysis table**)
    - Invalid Source Account Number (if new account be sure it has been added to BPP)
    - Occupant does not appear to be the same
    - UIN not found on Employee Table
    - PIN not found on Prep Budget
    - Rec 1 Salary rate changed without salary action code
    - Source dates outside annual term dates
    - Source % effort is invalid (example: .59 instead of 59.00)
    - Source begin date is invalid (example: 9/1/14)
    - Project code is invalid
  - **Records Uploaded Report**
  - **Records Already with Rec 2 Report** – if a rec 2 has already been updated in BPP manually or through a previous upload it will not override Rec 2 a second time
Basic Steps:

1. Update template for FY 2016 salaries; Per instructions above, add/delete/update items to template

2. Send to budget@tamu.edu anytime between July 1st and July 17th

3. Correct any errors on error report received and send back to budget@tamu.edu


5. Update BPP Prep entry until salary information is correct