Texas A&M University
Salary Recommendation Process and Phase II Budget Guidelines
FY 2010

Revised Merit Plan and TRS/ORP Contribution

Allocations given for centrally funded merit will be reduced by 0.5% during Phase II. As soon as the reallocation process begins on July 13th, units can begin reducing expense budgets on Screen 599 to account for the reduction. The merit plan has been revised from a 2% - 3% merit pool to a mandatory 2% merit pool.

The state contribution for TRS and ORP will be decreasing beginning September 1 from 6.58% to 6.4%. For those ORP participants who are grandfathered, (ORP participants on the state payroll as of August 31, 1995), the ORP employer contribution, both the state and TAMU portion, will remain at 8.5%. Therefore, the TAMU supplement portion will increase from 1.92% to 2.1%. Centrally funded accounts will not be affected. TRS/ORP benefits paid by local funds overall will decrease by 0.18%, but for grandfathered ORP participants there is no change.

GENERAL SALARY RECOMMENDATION PROCESS

Budget, Payroll and Personnel (BPP) Prep Budget Entry

FY2010 salary budget preparation begins July 6, 2009. Vice Presidents, Deans and/or Department Heads are responsible for approving salary recommendations prior to, or during Phase II. These recommendations should be forwarded to designated persons for entry into the BPP Prep Budget system. All recommended salary increases (merit increases, promotions, equity adjustments, etc.) should be entered either in the BPP Prep Electronic Feed Template or manually into the BPP Prep Budget system. Merit should be entered ONLY in Recommendation 2 and all other salary increases should be entered in Recommendation 3.

To verify accuracy of the data entered, a Current Prep Salary Report with Estimated Benefits will be distributed electronically on a daily basis to all departments and colleges beginning July 7, 2009. This report, similar to the BPP Prep Form 901, will be a useful tool throughout Phase II as it will include all updates made in BPP the previous day. This report will update ONLY when BPP Prep data has been either entered or uploaded in the BPP Prep module.

Beginning the evening of July 13, 2009, lump sum totals in FAMIS (entered during Phase I of the Budget) will be adjusted automatically by the re-allocator process, or manually by the Budget Office. This re-allocation process is necessary so that salary categories on FAMIS Screen 599 match the salaries in BPP Prep and the total budget remains within Board of Regents approved limits.

After all corrections and adjustments are made in BPP Prep and FAMIS, access will be turned off. BPP Prep access ends July 28, 2009 and FAMIS Access ends July 30, 2009.

The Budget Office will make final adjustments, budget books will be printed and distributed and the FY 2010 Budget Process will be complete.
Phase II – Important Dates

- **June 30** – The Budget Office will request TAMU System to roll Active BPP salary data into BPP Prep Budget system. Form 900 (Salary Report with Recommendations) will be available in DOF Imaging System. For instructions on how to gain access to the imaging system, click here. If you need additional assistance, please contact the Budget Office at 845-8145.

- **July 1 & 2** – Phase II Budget and Electronic Feed Template training/discussion.

- **July 6** – Phase II Begins
  - BPP Prep opens for manual data entry
  - Populated BPP Electronic Feed Templates distributed to budget contacts via email

- **July 7**

- **July 13** – Begin uploading any templates received. Any errors resulting in the BPP template feed will be distributed. Errors should be corrected on the spreadsheet and sent back to the budget office. Budget office will resubmit to BPP. Begin nightly updates (reallocation process) from Prep to FAMIS will begin.

- **July 14** – FAMIS Budget Module opens for adjustments related to Phase II (Screen 599).

- **July 17** – Last day to submit BPP Electronic Feed Templates - due to the Budget office via email (budget @tamu.edu); *Departments needing assistance with BPP Prep data entry should contact budget office before July 17, 2009.*

- **July 20–28** Updates and corrections must be entered in BPP manually.

- **July 24** – Last day to enter joint appointments between system parts.

- **July 28** – BPP Prep Budget manual corrections due by 4:30 pm – BPP Prep closed to users.

- **July 30** – FAMIS Screen 599 corrections due by 4:30 pm – FAMIS closed to users.

**Access to BPP Prep Budget**

Please click on the [link](#) to find out how to gain access to the BPP Prep Budget module.

**Access to FAMIS during Phase II**

Access to the Budget Module in FAMIS will re-open on July 14. During Phase II, users may make adjustments within expenditure categories or between salary accounts (in the same fund group). These changes may be necessary to keep the Phase II budget equal to the Phase I lump sum budget by account.
Please Note: You may not make any changes that would cause your Ending Balance to differ from the Ending Balance that was submitted during Phase I (i.e. changes to Beginning Balance, Revenues or Total Expenses).

Manual BPP Entry:

You may enter salary recommendations and any necessary data changes to positions (occupant, sources, job title, percent effort, elimination, etc.) beginning July 6. All salary recommendations with more than one salary source should be coordinated with ALL other units involved.

BPP will calculate Recommendation 1 for all employees. Recommendation 1 will equal the current rate of pay as of June 30, 2009.

BPP Prep Entry Hands-On sessions will be held during Phase II and will be communicated through the Budget Listserv when the dates and times are scheduled.

BPP Electronic Feed Template

As a new option this year, the BPP Electronic Feed Template will enable users to electronically submit their salary recommendations and source salary changes to BPP Prep Budget through the Budget Office.

- The BPP Electronic Feed Template will be provided by the Budget Office as a Microsoft Excel spreadsheet pre-populated with employee, source and recommendation 1 data and sent to departments on or before July 6, 2009.
- Recommendation 1 for all employees will be calculated.
- Recommendations for merit, equity, promotion, etc., along with changes to position and source information may be entered in the template.
- Once entry is complete in the template, the unit will forward the template to the Budget Office via email.
- The Budget Office will compile templates as they are received and submit daily beginning July 13 through July 17. Data in the submitted template will over-write any existing Prep Budget Data relating to salary recommendations 2 and 3, and source accounts.
- After the template has been loaded, users will have an opportunity to review their prep budgets and make any necessary adjustments in BPP between July 14 and July 28. All adjustments after the July 17th template feed must be entered manually by the unit in BPP Prep Budget System.

Training for this process is scheduled for July 1 & 2, 2009. To register for training please go here. If classes are full, please contact the Budget Office for further assistance.
PHASE II GUIDELINES

Salaries

1. Merit
   - A merit increase is defined as an increase in recognition of meritorious job performance but is not associated with a promotion or a change in job title resulting from a demonstrable, substantive change in job duties.
   - To be eligible for a merit award, an employee must have been employed for the six months immediately preceding the effective date of the merit salary increase, and six months have elapsed since the employee’s last merit salary increase or lump sum merit payment (See University Rule 31.01.01.M7, Employee Compensation Administration for further information).
   - To receive a merit increase, an employee must have demonstrated meritorious performance as documented on a current year, formal performance evaluation with a “Meets Expectation” or higher overall rating that has been conducted in accordance with university rules. The employee must not be currently subject to formal disciplinary action.
   - Although not required for FY2010 merit awards, it is recommended that an employee’s compliance status with required employee training be taken into consideration when determining merit awards.
   - A merit award may be given as a combination of a merit salary increase and a one-time lump sum merit payment with the same effective date.
   - Merit increases for individuals exceeding ten percent (10%), whether as a merit salary increase or as a combination of salary increase and one-time lump sum, require documented approval of the appropriate Vice President or Provost.
   - NEW - The merit pool authority for a unit will be calculated by multiplying March 1st active budgeted, non-graduate salaries by ADLOC at 2%. (Contact Budget Office for data).

Please Note: Consistent with previous years, merit increases awarded during Phase II, aggregated at the division level, will be reviewed to verify total merit dollars awarded were within the unit’s available merit pool.

a. Faculty Merit Increases
   - For FY 2010, merit increases for faculty should not exceed an aggregate average of 2% for each college (excluding promotion, one-time merit and equity increases) of the Budgeted Faculty positions that are eligible for merit raises, as defined above.

b. Staff Merit Increases
   - For FY 2010, merit increases for staff should not exceed an aggregate average of 2% for each college or division (excluding promotions, one-time merit, or equity increases) of the Budgeted Non-Faculty positions that are eligible for merit raises as defined above.

2. Faculty Promotions
   - Funds have been provided for salary increases for promotions in faculty rank based on 5% of the current 9-month salary of the individuals being promoted. Colleges may supplement these funds from internal sources.
3. **New Positions and Title Changes for Existing Non-Faculty Positions**

New positions (including title changes for existing non-faculty positions) must be approved in advance and must be funded within existing allocations before entering into BPP Prep. Please be aware that the University is subject to a faculty and staff FTE cap set by the 80th Legislature.

   a. **Non-classified**
      
      With the exception of faculty positions, new positions (including title changes to current positions) must be approved through normal administrative procedures prior to being budgeted.

   b. **Classified**
      
      Current classified positions may be reclassified, and new classified positions added to the budget, only after the appropriate approval document or electronic approval has been issued by Human Resources.

Human Resources guaranteed a July 15 completion of FY 2010 requests for new positions and reclassifications, if requests were received by May 15. Requests received between May 16 and July 15 will be completed for a September 1 effective date. Requests received after July 15 can be processed to be effective September 1 if it is approved within the biweekly or monthly pay period that includes September 1.

4. **Equity Adjustments**

In some cases, equity adjustments may be necessary to address gender and ethnic disparities, internal salary compression or high external demand for both faculty and staff. These should be made from existing funds available to the department; a portion of the merit pool may also be used to fund equity increases for faculty. All equity adjustment requests must be supported by strong evidence of necessity and must have advance Vice President or Provost approval, must be sustainable in future years, and should be made effective no earlier than September 1, 2009.