Agenda

- What is a SUD?
- What is a SUD **NOT**?
- How do HRMS, BUD and SUD relate?
- When to consider creating SUDs
- What kinds of positions can be on a SUD?
- Where does data loaded to SUD come from?
- What recommendations can be made in a SUD?
- What happens on final approval?
- What reports are available?
- What about authorization and routing for SUDs?
- What are key things to remember?
- What resources are available for users?
What is a SUD?

- Convenient and efficient way to adjust pay for multiple positions within a single document
  - Base pay
  - Existing permanent additional pay
- Use for pay adjustments with effective date of 9/1

TIP
SUD replaces need to create and route many Modify documents
What is a SUD NOT?

• SUD is **NOT** a reappointment document
• HRMS does **NOT** require new FY assignments other than for students
  • Employees with HRMS assignments that have no end date or extend into the new FY will automatically have appointments created

**TIP**
Prior to SUD opening, review all ongoing HRMS positions and assignments to ensure that they do not have 8/31 end date
When to consider creating SUDs?

- When budgeted positions have increases in BUD
  - Note: BUD does **NOT** load increase data directly to HRMS
  - BUD does load increase data to SUD, which then loads to HRMS
- When BUD document was not used to give increases to individual positions
  - SUD can be used to give 9/1 increases
- When non-budgeted positions have increases for 9/1

Prior to SUD opening, review all ongoing HRMS positions and assignments to ensure that they do not have 8/31 end date.
How do HRMS, BUD and SUD relate to each other?

- Rate effective as of next 9/1 & Budgetary funding for next FY (1)
- Budgetary funding for next 9/1 (from final budget) (4)
- 9/1 Recommended Rate (for non-budgeted positions) (2)
- FY Baseline rate on position (3)
- Budgeted Rate for next 9/1 (for budgeted positions) (2)
- HRMS SUD (Results in 9/1 recommended rate that updates the incumbent in HRMS)
What kinds of positions can be on a SUD?

- Faculty, A&P/Librarian and Classified
- Monthly paid
- Filled

**Exception:** Non-tenure track faculty positions will be on SUD whether or not they have 9/1 assignment, as long as position has not been ended on or before 8/31

**TIP**

School Teachers and Extension Instructors will not be in SUD. To adjust pay for 9/1 must create HRMS Modify document
Where does data loaded to SUD come from?

- Base Pay
  - **HRMS Current 8/31 Rate**
    - Loads from **HRMS** as of SUD load date
    - Updates if change is made in **HRMS** that affects 8/31
  - **BUD 9/1/10 Recommended Rate**
    - Loads from **BUD** as of SUD load date
    - Updates if Budget Office changes the base rate in **BUD**
Where does data loaded to SUD come from?

- Base Pay (con’t)
  - **SUD 9/1/10 Recommended Rate**
    - If in BUD, loads **BUD 9/1 Recommended Rate** as of SUD load date
    - If position not in BUD, loads **HRMS 9/1 rate** as of SUD load date
  - **Original 9/1 Rate**
    - Loads from **HRMS** as of SUD load date
Where does data loaded to SUD come from?

- **Existing Permanent Additional Pay**
  - **HRMS** 9/1 Original Rate for any existing Permanent Additional Pay as of SUD load date
  - **BUD** 9/1 Budgeted Rate
    - Rate for any existing Permanent Additional Pay as of SUD load date
    - Includes any new Permanent Additional Pay added in **BUD**
Where does data loaded to SUD come from?

- **Existing Permanent Additional Pay** (con’t)
  - **SUD 9/1 Recommended Rate**
    - If in BUD, loads **BUD 9/1 recommended rate** as of SUD load date
    - If position not in BUD, loads **HRMS 9/1 rate** as of SUD load date

**TIP**
Changes can be made in HRMS while SUD is open, but use caution since certain changes can affect ability of SUD data to load to HRMS
What recommendations can be made in a SUD?

- Base pay
  - Adjustment type and amount
  - Similar types available in HRMS

Modify docs
- Faculty
  - Merit
  - Equity/Structural Adjustment
  - Counter Offer
  - Pre-emptive retention
- A&P/Librarian and Classified
  - Merit
  - Equity/Structural Adjustment
  - Permanent Additional Duties
  - Trainee Increase
  - Counter Offer

TIP: Maximum of one adjustment per type
What recommendations can be made in a SUD?

- Permanent additional pay
- Adjust Rate
  - Amount to be expended during next fiscal year
- Delete additional pay
  - Effective on 8/31 prior to new FY
  - Additional pay will not exist in next FY
What recommendations can be made in a SUD?

- For positions in a BUD, users can make further pay adjustments in SUD, if necessary
  - For example, may have budgeted base pay for all positions in a BUD using lump sum method and not budgeted by position
  - Could use SUD to update 9/1 rates for individual filled positions
What happens to SUD data on final approval?

- At final approval, SUD recommendations load to HRMS
  - 9/1 **Base Pay** rate for incumbent for budgeted and non-budgeted positions
  - 9/1 amount of **Permanent Additional Pay**
  - SUD base pay rate establishes the position **FY baseline** effective 9/1

After SUD loads data to HRMS, position FY baseline can be updated via an HRMS Modify document that changes incumbent base pay amount with 9/1 effective date
What happens to SUD data on final approval?

- Budget Documents in Budget Office
- SUD Loads
- SUD Opens
- SUD Created
- SUD Final Approved

Use CAUTION when making updates in HRMS. Could cause SUD data NOT to load to HRMS.
What happens to SUD data on final approval?

- SUD data will **NOT** load to HRMS if change has been made in HRMS to any of following fields since SUD load date
  - Job code
  - Owning unit
  - Base Pay Rate with a 9/1 or later effective date
What happens to SUD data on final approval?

- SUD data will **NOT** load to HRMS if change has been made in HRMS to any of following fields since SUD load date (con’t)
  - Changes to existing **Permanent Additional Pay** including:
    - amount
    - additional pay type
    - account number
    - end date (if any)

**TIP**

Changes to the begin date is permitted so long as the new date is still before the SUD effective date.
What happens to SUD data on final approval?

- SUD data will not load to HRMS if there has been addition in HRMS (since SUD load date) of new **Permanent Additional Pay** of type that would have loaded to SUD with an effective date of 9/1

At final approval of SUD with one or more exceptions, report is pushed to creator via email with positions for which SUD data did not load to HRMS
What reports are available?

- SUD reports can be generated from left nav link
- Reports → Document Reports → SUD Reports
What about authorizations for SUDs?

- Determine what desks/users should be authorized for view or update of SUD types
  - J1J, Tenure/Tenure Track Faculty
  - J1N, Non-Tenure Track Faculty
  - J1R, A&P and Librarians
  - J1Q, Classified

**TIP**
If desk/user already authorized for JMM, then are currently authorized for all SUD types. No additional authorization is necessary.
What about routing for SUDs?

- Owning unit → funding unit(s)
- No changes up the chain for A&P/librarian, classified SUDs
- Changes up the chain for non-tenured and tenure/tenure-track faculty SUDs

TIP: To streamline routing, creator can select positions for SUD based on funding unit(s)
What are key things to remember?

- Increases made on BUD do NOT load directly to HRMS.
- SUD can be used to give 9/1 increases to filled monthly-paid budgeted and non-budgeted positions/incumbents (other than students):
  - Base Pay
  - Permanent Additional Pay
- Use caution when making changes in HRMS prior to SUD being final approved:
  - Can cause SUD data not to load to HRMS
How do HRMS, BUD and SUD relate to each other?

Information flow from HRMS & BUD into HRMS Salary Update Document (SUD)

- Rate effective as of next 9/1 & Budgetary funding for next FY  (1)
- Budgetary funding for next 9/1 (from final budget)  (4)
- 9/1 Recommended Rate (for non budgeted positions)  (2)
- Next FY 9/1 Rate & FY Baseline rate on Position  (3)
- Budgeted Rate for next 9/1 (for budgeted positions)  (2)

HRMS

SUD
(Results in 9/1 recommended rate that updates the incumbent in HRMS)
Where does data loaded to SUD come from?

- **Base Pay**
  - BUD 9/1/10 Recommended Rate
    - Updates if the Budget Office changes the base rate in a BUD
  - SUD 9/1/10 Recommended Rate
    - If in BUD, will load the BUD 9/1 recommended rate
    - Position not in BUD, will load HRMS 9/1 rate (as of the date the SUD loads)
Where does data loaded to SUD come from?

- Existing Permanent Additional Pay
  - HRMS
    - 9/1 amount (as of the date the SUD loads)
  - BUD
    - Includes any new Permanent Additional Pay added in the BUD
    - 9/1 recommended amount
When can a SUD be created?

- A SUD can be created whenever
  - All BUDs are in Budget Office
  - Budget Office takes action to load HRMS and BUD data to SUD (hereafter known as ‘SUD load’)
  - Budget Office takes action to open the SUDs for updating

TIP: If position/incumbent will not have increase for 9/1, placing position in SUD is optional (except for T/TT). HRMS system does not monitor that all active positions in HRMS have been placed in SUD
Who creates SUDs for “Special Handling” positions?

• “Special Handling” SUDs are created and approved by the Budget Office
• Can be created by Position Category without regard to owning unit
• Final approve within Budget Office, no external routing
• “Special Handling” positions are those that report directly to President or Vice-president, or have been marked as “Special handling” by the Budget Office
• “Special Handling” positions cannot be placed on SUD created by owning unit
What other documents will the Budget Office handle?

- The SUDs for Non-Tenure Track Faculty (J1N) will be created by the owning unit, but will ROUTE to the Budget Office, so that promotion amounts can be added, as needed.
HRMS Salary Update Document (SUD)
Staffing & Career Management Services

Spring 2010
## Prior Approval Table

- HRS reviews/approves certain types of adjustments to base pay through the Salary Adjustment Form [http://www.utexas.edu/hr/forms/salary_form.doc](http://www.utexas.edu/hr/forms/salary_form.doc)

- For the purposes of the SUD:
  - Merit increases **do not** require prior approval by HRS.
  - A&P/Librarians and Classified require prior HRS approval for:
    - New permanent additional duties
    - Equity
    - Counter Offer
    - Trainee Increase
Review Requirements

- Until 8/31/2010, we are operating under a salary freeze (excluding grant funded positions).
- For actions effective 9/1/2010 or later, UBC review is not required.
- Please remember to allow for an appropriate amount of time for HRS review/approval for salary adjustment requests.
Tenure/Tenure-track faculty

- Titles and promotion increases will load to the SUD from the BUD.
- All T/TT faculty positions MUST be on a SUD.
- Use appropriate pay types based on pay type definitions.
  - Review budgeted (BUD) pay types and adjust if needed.
- Rates are updatable up the routing chain.
- Faculty SUDs will route to Provost Office before HRS.
- Budget Council approval
Non tenure-track faculty

- SUDs must be created for NTT faculty who are being promoted and/or recommended for increases.
- Rates can be changed up the routing chain.
- Use appropriate pay types based on pay type definitions.
- Mass assign document is in development and will be available for FY 10-11 assignments.
  - Adjustments to rate will not be available on the mass assign document.
## Pay type definitions for faculty

<table>
<thead>
<tr>
<th>Former</th>
<th>Current</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Merit</td>
<td>Merit</td>
<td>Performance exceeding normal expectations</td>
</tr>
<tr>
<td>Equity</td>
<td>Equity/Structural Adjustment</td>
<td>Adjustments for addressing relative discrepancies within department, e.g. equity and compression. Adjustments to address competitiveness and market pressures</td>
</tr>
<tr>
<td>Counteroffer</td>
<td>Counteroffer</td>
<td>Direct response to a documented offer from elsewhere</td>
</tr>
<tr>
<td>Pre-emptive counteroffer</td>
<td>Pre-emptive Retention</td>
<td>Response for situations where employee is being courted, but may not have a firm offer. Response for situations where employee is perceived to be highly marketable and likely to be recruited</td>
</tr>
<tr>
<td>Retention</td>
<td>Delete</td>
<td></td>
</tr>
</tbody>
</table>
What resources are available for users?

- HRMS Help
- askUS knowledge database  
  https://austin-utexas.custhelp.com/
- HRMS Video page  
  www.utexas.edu/business/erp/hrms/video
- HRMS Support - link located in the footer of HRMS pages
What resources are available for users?

• Budget Office
  http://www.utexas.edu/business/budget/

• Human Resource Services
  http://www.utexas.edu/hr/

• Payroll Services
  http://www.utexas.edu/payroll/

• Provost Office
  http://www.utexas.edu/provost/
Survey

http://www.surveymonkey.com/s/RKYRJHT