

## COMPENSATION PLANNING

In Compensation Planning, administrators can create plans to request salary increase and bonus recommendations from managers. Managers, often referred to as Reviewers within compensation plans, will receive tasks to complete these recommendations.

To access the task for your direct reports, you must have one of these roles:

- Manager
- Submit Compensation Recommendations

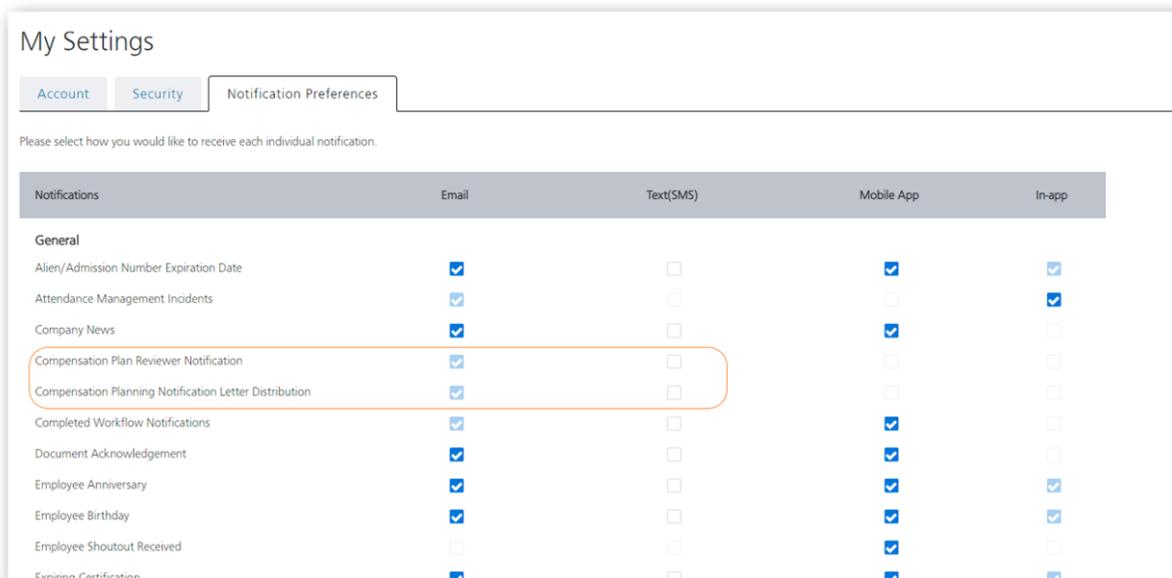
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### Task Notifications

When a plan is launched that includes some or all your direct reports, you will receive a task.

- To adjust your text and email notifications settings, go to **My Settings**, click the **Notification Preferences** tab.



You will find Compensation Planning tasks assigned to you in two spots:

- 1 The **task widget** on your homepage
- 2 Under **Me -> Tasks & Notifications**

### Submitting a Task

When you open a task, you will see a list of your direct reports included in the compensation plan. Depending on the settings your administrators used, you may see all your reports or a subset. Your task will ask you to submit salary changes and/or one-time payments, depending on the plan settings. At the top of the page, you will see the date your submission is due.

- You can enter a salary recommendation as a percentage, a dollar amount, or just enter the desired new salary. Once you enter a value in one of those fields, the other two will recalculate accordingly.
- Once you have adjusted the salary and/or rewarded one-time payments appropriately, click **Submit Plan**. This will initiate any approval processes configured and allow your administrators to see your recommendations.
- The pay changes are not immediately effective and require additional action from your administrators.

Name	Employee Number	Job Title	Review Rating	Current Salary <sup>?</sup>	Increase %	Increase \$	New Salary <sup>?</sup>	New Compa-ratio <sup>?</sup>	One-time Payment \$
Finamore, Alex	280	Operations Specialist	3.00000 / 5.00	\$39,999.96 (\$769.23 / per pay)	<input type="text" value="3.000000"/>	<input type="text" value="1200.16"/>	<input type="text" value="41200.12"/> (\$792.31 / per pay)	0.87	<input type="text" value="200.00"/>
Gilmore, Maria	242	Operations Specialist	3.40000 / 5.00	\$41,099.76 (\$790.38 / per pay)	<input type="text" value="3.000000"/>	<input type="text" value="1232.92"/>	<input type="text" value="42332.68"/> (\$814.09 / per pay)	0.90	<input type="text" value="200.00"/>
Maddox, Emily	212	Operations Specialist	2.40000 / 5.00	\$16,500,000 / hr (\$34,320.00)	<input type="text" value="3.500000"/>	<input type="text" value="0.577500"/>	<input type="text" value="17,077,500"/> (\$35,521.20)	0.75	<input type="text" value="200.00"/>
Patterson, Michele	209	Receptionist	3.80000 / 5.00	\$15,000,000 / hr (\$31,200.00)	<input type="text" value="3.000000"/>	<input type="text" value="0.450000"/>	<input type="text" value="15,450,000"/> (\$32,136.00)	0.95	<input type="text" value="200.00"/>
Totals:				\$146,619.72	\$4,570.28	\$4,570.28	\$151,190.00	Avg: 0.87	\$800.00

Cancel
Submit Plan

## Compa-Ratio

If your organization uses pay ranges, you will also see the employee's new compa-ratio recalculating as you enter recommendations. You can use compa-ratio to understand how an employee's salary compares to the midpoint of their position's pay range. Compa-ratio is a measurement of an employee's salary compared to the midpoint of their position's pay range. This ratio is calculated using the following formula:

- $\text{Compa-Ratio} = \text{Salary} \div \text{Pay Range Midpoint}$

**Example:** if John earns \$54K per year and the annual salary range for his job is \$40K to \$80K, the midpoint would be \$60K =0.90. Meaning, John is earning 90% of the midpoint of his salary range. He is close to the midpoint; earning about average for his position.

- Ratios below 1.00 indicate the employee is paid below the midpoint (just like John, in our example), while a ratio at 1.00 means the employee is paid at midpoint, and a ratio above 1.00 means the employee is paid above midpoint.
- Compare the compa-ratios for multiple employees to quickly see who is earning significantly more or less than others in the same position.

## Budgets and Limits

Your administrators might set up budgets and limits that are enforced when you're submitting recommendations.

- **Budgets:** At the top of the page, you will see how much is budgeted for salary increases and/or one-time payments. As you enter recommendations, you can see how much of your budget has been used vs. how much is remaining. If you go over your budget, the bar will turn red.
- **Limits:** If the plan has limits on how small or how large of a reward you can provide, you will be alerted with a red box around a field if you enter a recommendation that doesn't fit within the limits. You will not be able to submit your recommendations until these are corrected.

(Image on the next page)

Operations - FY20 Plan

Increase \$4,832.88 / \$4,054.99 One-time Payment \$5,000.00 / \$5,000.00  
 8/17/2020 8/29/2020 - 9/11/2020 Due Date: 7/31/2020

Salary Increase Limits: Min: 0.00% | Target: 5.00% | Max: 7.00% One-time Payment Limits: Min: \$0.00 | Max: \$2000.00

Name	Employee Number	Job Title	Review Rating	Current Salary <sup>?</sup>	Increase %	Increase \$	New Salary <sup>?</sup>	New Compa-ratio <sup>?</sup>	One-time Payment \$
Finamore, Alex	280	Operations Specialist	3.00000 / 5.00	\$39,999.96 (\$769.23 / per pay)	9.000000 <span style="color: red;">Outside Guidelines</span>	3599.96	43599.92 (\$838.46 / per pay)	0.93	3000.00 <span style="color: red;">Outside Guidelines</span>
Gilmore, Maria	242	Operations Specialist	3.40000 / 5.00	\$41,099.76 (\$790.38 / per pay)	3.000000	1232.92	42332.68 (\$814.09 / per pay)	0.90	2000.00
Totals:				\$81,099.72	\$4,832.88	\$4,832.88	\$85,932.60	Avg: 0.92	\$5,000.00

Cancel Submit Plan

## Sharing Letters with Employees

After the plan is finished, your administrators might leverage a feature to create notification letters for telling employees about the pay changes. If this is the case, you might get a notification about letters being distributed to you.

- 1 After a letter is distributed, reviewers with employees who qualify for that specific letter will receive a task. If multiple letters are shared, reviewers might receive multiple tasks.
- 2 The task list displays all employees who you submitted recommendations for, as long as they qualified for the letter. To view the letter before sharing, under the employee's name, click **View Notification**.
- 3 To share out the letter with an employee, in the **Action/Status** column, click **Share Notification**. This adds the letter to the employee's **Documents** screen in their employee profile, as shown in this screenshot:

(Image on the next page)

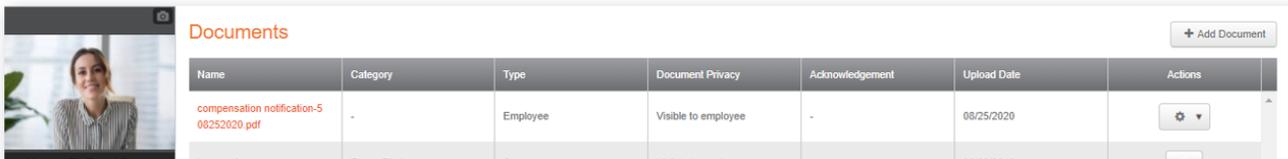
### Distribute Bonus Letter Notification

Name	Job Title	Current Salary <sup>?</sup>	Increase %	Increase \$	New Salary <sup>?</sup>	New Compa-ratio <sup>?</sup>	One-time Payment \$	Actions/Status
Franklin, Nancy <a href="#">(view notification)</a>	Product Manager	\$59,400.12 (\$1,142.31 / per pay)	3.000000	\$1,782.04	\$61,182.16 (\$1,176.58 / per pay)		\$500.00	<a href="#">Share Notification</a>

[Exit](#)

[✓ Distribution Completed](#)

**Note:** Anyone with access to the employee's **Document** screen can see the letter, including the employee. A letter can be shared only with each employee once. Upon sharing, the administrator will see the updated status. Notification shared by reviewer, on their view, as well.



Name	Category	Type	Document Privacy	Acknowledgement	Upload Date	Actions
compensation notification-5 08252020.pdf	-	Employee	Visible to employee	-	08/25/2020	<a href="#">⚙</a>

**4** After you share all documents appropriately, you can click **Distribution Completed** to close the task and move it to your **History**.