

Complete Guidelines and Best Practices for Compensation Administration for Tarleton State University

These guidelines are provided as supplement to [The Texas A&M System Regulation 31.01.01 Compensation Administration](#).

As per regulation: Each member CEO or designee shall establish and communicate salary administration guidelines for all categories of positions. These guidelines should address internal equity, objective and fair treatment, competitiveness with the appropriate external markets, and compliance with appropriate federal and state laws.

These guidelines will assist department managers and divisional administrators on various steps of the compensation processes. It is important that the manager and all those making compensation decisions have access to this information at the onset of the process. Adherence to these guidelines will ensure best practices are applied and compliance is met with applicable federal and state laws and Texas A&M University System and Tarleton State University policies, regulations and procedures. The sections that follow address compensation guidelines, standard operating procedures and specific business processes for all budgeted faculty and staff, temporary/casual workers, graduate assistants and student employees. Each of these sections discusses important key elements of the process as well as the types of documentation that must be retained.

This guide is a written supplement to the complete, Web resource [soon to be] located at <https://www.tarleton.edu/hr/compensation/index.html>. Each section of this guide can be quickly accessed through links. The 📍 on the end of each section will also bring you back to the beginning.

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Policy, Regulation and Standard Procedures

Employee Services administers all compensation processes in accordance with specified System and University policy regulations and procedures.

The Texas A&M University System Policies and Regulations

The Texas A&M University System Policy 31.01 *Compensation*

<http://policies.tamus.edu/31-01.pdf>

The Texas A&M University System Regulation 31.01.01 *Compensation Administration*

<http://policies.tamus.edu/31-01-01.pdf>

The Texas A&M University System Regulation 31.01.02 *Fair Labor Standards*

<http://policies.tamus.edu/31-01-02.pdf>

The Texas A&M University System Regulation 31.01.08 *Merit Salary Increases*

<http://policies.tamus.edu/31-01-08.pdf>

The Texas A&M University System Regulation 31.01.09 *Overtime*

<http://policies.tamus.edu/31-01-09.pdf>

The Texas A&M University System Regulation 32.02.02 *Discipline and Dismissal of Nonfaculty Employees*

<http://policies.tamus.edu/32-02-02.pdf>

The Texas A&M University System Regulation 33.99.01 *Employment Practices*

<http://policies.tamus.edu/33-99-01.pdf>

The Texas A&M University System Regulation 33.99.04 *Promotions, Transfers and Voluntary Moves*

<http://policies.tamus.edu/33-99-04.pdf>

The Texas A&M University System Regulation 33.99.05 *Part-Time Employment*

<http://policies.tamus.edu/33-99-05.pdf>

The Texas A&M University System Regulation 33.99.06 *Administration of Multiple Employment*

<http://policies.tamus.edu/33-99-06.pdf>

Tarleton Rules and Standard Administrative Procedures

Tarleton SAP No. 12.02.99.T0.01 *Procedures for Implementing Tenure*

https://www.tarleton.edu/policy/documents/12_02_99_T0_01.pdf

Tarleton SAP No. 25.99.09.T0.01 *Communication Allowance*

https://www.tarleton.edu/policy/documents/25_99_09_T0_01.pdf

Tarleton SAP No. 31.01.01.T0.02 *Compensation for Faculty Research & Service*

https://www.tarleton.edu/policy/documents/31_01_01_t0_02.pdf

Tarleton SAP No. 31.01.01.T0.03 *On Call Responsibility and Pay*

https://www.tarleton.edu/policy/documents/31_01_01_T0_03.pdf

Tarleton Rule 31.01.08.T1 *Merit Salary Increases*

https://www.tarleton.edu/policy/documents/31_01_08_T1.pdf

Tarleton SAP No. 31.01.09.T0.01 *Overtime*

https://www.tarleton.edu/policy/documents/31_01_09_T0_01.pdf

Tarleton SAP No. 31.99.99.T0.01 *Salary Adjustments for Completion of Academic Degrees*

https://www.tarleton.edu/policy/documents/31_99_99_t0_01.pdf

Tarleton SAP No. 31.99.99.T0.03 *Administrative Salary Differentials for Non-Academic Interim Positions*

https://www.tarleton.edu/policy/documents/31_99_99_T0_03.pdf

Tarleton SAP No. 33.99.01.T0.01 *Hiring Faculty and Non-Faculty*

https://www.tarleton.edu/policy/documents/33_99_01_T0.pdf

Tarleton Rule No. 33.99.14.T1 *Criminal History Record Information*

https://www.tarleton.edu/policy/documents/33_99_14_T1.pdf



Salary Actions, Documentation and Approval

The base salary of all Tarleton employees will be a fixed amount and no employee will receive any additional base salary from Tarleton without specific approval of the President, or designee. The annual operating budget and personnel salary actions initiated during the year must be prepared and processed in accordance with this requirement. All salary actions must include documentation that addresses the justification of the increase.

[Promoting Employee to New Position](#)

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Pay Rates and Salary Structure

Pay rates for budgeted staff positions are derived from each graded job profile within the Texas A&M System Central Pay Plan and documented through a minimum pay grade structure utilized to set salaries for new hires, promotions, reclassifications and transfers.

Basic details regarding faculty salary, tenure and promotion can be found within [Tarleton's Faculty Handbook](#).

Pay rates for Adjunct Faculty, Temporary/Casual Positions, Graduate Assistants and Student Employees are documented through individual pay plans used by Tarleton which indicate specific job profiles permitted for use. This information can be found within the Comprehensive Pay Plan documentation.

[Comprehensive Pay Plan](#)



Consistent and Equitable Salaries

When a position is newly established or reclassified, the duties and responsibilities of the position are compared with other similar positions within the Tarleton's workforce, The Texas A&M System, and sometimes regionally or nationally. Each position is then assigned a job profile which has a specific salary grade based on internal and external market factors determined by the Texas A&M System's Central Pay Plan administrator. Actual salaries may differ based on seniority, performance, or employee qualifications.

Employee Services conducts position and market studies upon request with a dean or assistant vice president level (or above) approval, including review of current salaries and positions for appropriate job profile, minimum standard qualifications and grade. Additionally, Employee Services will review requests for new positions, reclassification of existing positions and internal promotion or transfer for appropriateness of the job profile, minimum standard qualifications and proposed salary.



Base Salary Increases

There are several ways in which employees' salaries can be increased after hire.

Promotion Increase: An increase that occurs when an employee moves from his/her current position to a position with a different Position Identification Number (PIN) as a result of the hiring process or through approved internal promotion, and the position requires higher qualifications (such as greater skill, more education or experience, or a higher level of responsibility) and a higher rate of pay.

[Promoting Employee to New Position](#)

Reclassification/Re-evaluation Increase: An increase that occurs when job duties, responsibilities, and required qualifications of a position are reevaluated and the position is assigned to a different title that warrants a higher rate of pay within the same PIN.

[Promoting Employee in Current Position \(Reclassification\)](#)

Merit Salary Increase: An increase granted to an employee in recognition of meritorious job performance with no title change, in accordance with the criteria described in System regulation and university rule. The two types of merit salary increases include:

Merit raise: An increase that is added to the employee's salary base.

One-time merit payment: A lump sum that is not added to the employee's base salary.

[Merit Salary Increase](#)

Administrative Salary Differentials for Non-Academic Interim Positions: An increase to compensate an employee who assumes additional or a higher level of responsibilities and duties on a temporary basis.

[Administrative Salary Differentials for Non-Academic Interim Positions](#)

Equity Adjustment: A salary adjustment made for the purpose of establishing a fairer and more comparable relationship between the salaries of two or more employees in the same job title or grade relative to experience, education and/or certification.

[Equity Adjustment](#)

Market Adjustment: An increase granted to establish equity/competitiveness with salaries paid in the relevant labor market, as documented by approved survey data.

[Market Adjustment](#)

Increase Due to Change in Minimum Rates (Pay Plan Increase): An increase that occurs when market conditions or changes in applicable laws dictate the adjustment of the salary grade or salary minimum for a particular central pay plan job profile.

Salary Adjustments for Completion of Academic Degrees: A one-time base salary adjustment awarded for an employee earning their first initial degree or professional certification.

Salary Adjustments for Completion of Academic Degrees or Professional Certifications

Hiring Salary Adjustment: An increase from minimum base salary that may be applied for newly hired employees who have specific skills and experiences above the minimum qualifications for the position.
[New Hire](#)

Across-the-Board Increase: A uniform salary increase given in accordance with prescribed guidelines, often granted by legislative enactment, without regard to individual merit of employees.



Job Changes Impacting Salary

New Hire: A “new hire” occurs when an individual who is not currently a budgeted employee of Tarleton State University is hired into a budgeted position.

[New Hire](#)

Promotion: A change in employee status is considered a promotion when an employee moves from his or her current budgeted position to a budgeted position with a different PIN as a result of the hiring process or through approved internal promotion, and the position requires higher qualifications (such as greater skill or more education or experience or involving a higher level of responsibility), a higher rate of pay and usually a different title. A vice president may approve the promotion of a qualified internal candidate currently employed in a budgeted position to fill a vacant budgeted position without posting a Notice of Vacancy

[Promoting Employee to New Position](#)

Promotion/Reclassification: When a position’s job duties, responsibilities and required qualifications are reevaluated and the position is assigned to a different job profile within the same PIN.

[Promoting Employee in Current Position \(Reclassification\)](#)

Transfer: A change in employee status is considered a transfer when an employee moves from his or her current budgeted position to a budgeted position with a different PIN as a result of the hiring process or through approved internal transfer and the move does not meet the definition of a promotion. Transfers include lateral transfers and voluntary moves to lower positions. A vice president may approve the transfer of a qualified internal candidate currently employed in a budgeted position to fill a vacant budgeted position without posting a Notice of Vacancy.

[Transferring Employee to New Position](#)



Non-disciplinary Demotions

This section addresses non-disciplinary demotions only. A non-disciplinary demotion occurs when an individual moves from one position to another position having a lower pay range and/or a less senior title requiring less education, experience and responsibility. Salary adjustments may be made in the event of a demotion resulting either from an employee's request to transfer to another position or at the request of the university. Salary adjustments are optional and based upon departmental funding. Employee Services is available to assist in determining the salary rate.

If the demotion occurs as a result of the employee's request to transfer to a lower position, either in the same department or in another department, the receiving supervisor may adjust the employee's salary to the position's job profile minimum pay grade. The new salary should be based on factors, including but not limited to, responsibilities/requirements of the position, uniqueness of the position, the employee's years of experience/service, the pay of other employees in the same or in similarly situated positions, and the recruiting range of the position.

If the demotion occurs at the request of the university and is not part of a disciplinary process, salary adjustments are optional and based upon funding availability.

All demotions must be documented and approved up through the appropriate divisional vice president.

If the demotion occurs as a result of disciplinary action in accordance with [The Texas A&M System Regulation 32.02.02, Discipline and Dismissal of Nonfaculty Employees](#) the supervisor or department head must consult with Employee Services before proceeding.

[Transferring Employee to New Position](#)



Multiple (Joint or Dual) Employment

Multiple Employment may occur as either *Joint Employment* or *Dual Employment*. Joint Employment occurs when a System employee occupies one position, but is assigned to duties in more than one department, unit, or component of the System; the various segments of a joint employment position have common basic educational and experience requirements and are paid at a common salary rate. Dual Employment exists when an employee of the state occupies two or more separate positions within the Texas state government. In a joint employment relationship, all hours worked by a nonexempt employee are to be combined for the purposes of assessing overtime compensation. When a nonexempt employee works in a Dual Employment arrangement in two or more System positions, the hours in the two separate positions will be combined for overtime purposes with exceptions.

If an employee undertakes, on an occasional or sporadic basis, and solely at the employee's option, part-time employment with the System which is in a different capacity from that in which the employee regularly engages, the hours worked in the additional part-time job shall be excluded in assessing hours worked for overtime purposes. Additionally, all hours worked in the secondary job must be worked outside regular work hours from the primary job.

[Adding a Job to an Employee \(Dual Employment\)](#)

[The Texas A&M University System Regulation 33.99.05 *Part-Time Employment*](#)

[The Texas A&M University System Regulation 33.99.06 *Administration of Multiple Employment*](#)



One Time (Lump Sum) Compensation

One-time, or "Lump Sum," payments can be made to an employee for various work-related activities considered supplemental pay outside the scope of regular responsibilities. Communication equipment allowances, moving expense allowances, employee awards and payouts at separation are other one-time payment instances.

One-time supplemental pay can be applied as "Extra Pay for Dual Employment" or "Extra Pay for Single Activity." The application of one-time payments--specific uses of and reasons for--are determined appropriate by divisional vice presidents in accordance with all state, System and Tarleton regulations, rules and procedures. Managers and department heads (cost center approvers) are responsible for implementing and approving one-time payments in accordance with these same regulations and rules.

The following are some examples of the various one-time payment opportunities currently applied on campus: test proctoring, working at camps, extra pay outside regular duties such as special projects, service opportunities, and athletic personnel contract incentives.

For more information and examples, please refer to the *Request One-Time Payment* job aid available on the Workday help site at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>



Allowances

There are several types of allowances that can be applied to an employee's compensation. Some allowances are derived by the nature of an employee's position and reviewed and applied accordingly such as communications allowances or "on-call" responsibility and pay. Some allowances are derived by pay for temporary additional employee efforts beyond the scope of their job's responsibilities such as temporary interim increases, department head stipends, or faculty teaching in excess of 100% (overloads).

All allowances are considered temporary and subject to periodic review by documented standard procedures.

[Adding an Allowance to an Employee's Compensation](#)

[Tarleton SAP No. 25.99.09.T0.01 *Communication Allowance*](#)

[Tarleton SAP No. 31.01.01.T0.03 *On Call Responsibility and Pay*](#)



Retroactive Pay Increases

The Texas A&M System Office of General Counsel has researched retroactive pay increases and concluded that there is no authorization by the State of Texas to grant such increases based on:

Article III, Section 53 of the Texas Constitution prohibits the payment of retroactive increases to State employees. It states there is no power to grant any extra compensation to an individual after the service has been rendered.

Increases may be effective on the first day of the pay period in which the individual authorized to approve salary increases signed the approval document.

[The Texas A&M University System Regulation 31.01.01 Compensation Administration](#)



Method of Salary Payment and Records

Personnel employed on an annual salary basis are paid in monthly installments. Personnel employed on an hourly salary basis are paid in bi-weekly installments.

Monthly salaries are paid on the first working day of the following calendar month unless the first working day is a designated state or national holiday, in which case monthly salaries will be paid on the first working day after the holiday. Hourly salaries are paid bi-weekly on a predetermined pay period schedule published by the Tarleton Payroll Office at <https://www.tarleton.edu/payroll/index.html>

Records and reports associated with salary and wage payments required by federal and state law, regulation, and by accounting systems of A&M System members are incorporated in the human resource information system, Workday.



Overtime and Exempt vs. Non-Exempt Positions

Tarleton State University's Overtime FAQs help address questions associated with the Fair Labor Standards Act (FLSA), overtime eligibility, compensation, work time and documentation for employees and supervisors. [The Texas A&M University System Regulation 31.01.02 Fair Labor Standards](#) documents procedures and responsibilities.

[Frequently Asked Questions About the Fair Labor Standards Act \(FLSA\) and Overtime Rules](#)



Comprehensive Pay Plan

Tarleton's Comprehensive Pay Plan is derived from the [Texas A&M System-wide Pay Plan](#) which contains job profiles and rates of pay for each position utilized at Tarleton State University. Employee Services has been delegated the responsibility for the application of this system-wide pay plan for campus in addition to articulating the student, graduate student, adjunct faculty and temporary/wage pay plans specific to Tarleton.

It is the policy of Tarleton State University that all persons shall have equal opportunities afforded them in all employment-related functions, regardless of race, color, religion, national origin, gender, age, disability, or status as a veteran. "Equal opportunities" include but are not limited to: initial employment; position classification and reclassification; promotion; transfer; demotion; recruitment or recruitment advertising; reduction in force or other termination; rates of pay; benefits; rights of appeal and due process; and selection for training. Tarleton State University, an Equal Opportunity and Affirmative Action Employer and Educator, is committed to excellence through diversity.

[The Texas A&M System Wide Pay Plan](#)

[Tarleton Minimum Pay Grade Structure](#)

[Student Employment Pay Plan](#)

[Graduate Student Employment Pay Plan](#)

[Adjunct Employment Pay Plan](#)

[Temporary Employment Pay Plan](#)



About The Texas A&M System-wide Pay Plan

Compensation Philosophy

The Texas A&M System maintains a System-wide Pay Plan focused on attracting, retaining and rewarding a qualified and diverse workforce. Within the boundaries of financial feasibility, employee compensation shall be externally competitive and internally equitable.

Salary Administration System

- The System-wide Pay plan for staff will be based on:
- Job families with distinguishable jobs
- Job descriptions with duties and minimum requirements
- A pay structure with grade (salary) minimums
- Classification of positions: allocation to applicable job family and job level that most appropriately captures the characteristic level and type of occupational work
- Compliance with applicable federal and state laws and regulations.
- Not discriminating against any applicant or employee regardless of race, religion, color, national origin, sex, age, sexual orientation, genetic information, gender identity, and status as a protected veteran and/or individual with a disability, or any other illegal factor, for any position for which the applicant or employee is qualified.
- Consistent framework for managing salary administration actions that allows flexibility within each System Member for the effective management of individual salaries while operating within established budget parameters and fiscal resources.

Competitive Markets

Competitive markets used for benchmarking and maintaining the System-wide Pay Plan will reflect the current state of the competitive environment for different job families and roles. For positions found primarily in higher education, the comparison market will be a group of public doctoral and master's institutions at the national, regional, or local level, depending upon the position. For positions in Information Technology, Human Resources, Finance and Accounting and other key non-academic positions, broad industry markets will be used in addition to the identified universities to develop and maintain the salary structure. For positions (i.e., professional non-faculty) which are not higher education specific, general industry comparison data for the State of Texas may be used in addition to the identified universities to develop and maintain the salary structure. Regional geographical differentials may be considered. System internal equity and market competitiveness will be monitored regularly to ensure continued program effectiveness.

Market Data Review

Competitive market data should be analyzed every two years or as often as necessary and salary structures should be adjusted to maintain competitive salary ranges. The analysis and any adjustments should be based on:

- Reliable published surveys to preserve consistency.

- An adequate number of jobs within each job family on which to gather market data (benchmark jobs).
- Matching jobs based on actual duties and responsibilities, not job titles.
- Comparing the relevant employment market for each benchmark job.
- Conducting independent third-party surveys when necessary.
- Monitoring market trends and movement of salary structures.
- Recognizing each System Member's financial environment when making salary range adjustments.

Definitions

Attributes – Characteristics of a position title to include but not limited to Title Code, Pay Grade, Job Family, Management Level, EEO, FLSA, SOC Code, Faculty Rank, ORP Eligibility, Primary Activity, Term Indicator, PI Designation, Education, Experience, and Supervision.

Competitive Market Data -- Published and independent salary surveys of the relevant employment markets for job families and their job levels.

Excluded Titles - board-appointed positions, faculty, faculty administrator and faculty-equivalent positions, as defined by each System Member, key administrator positions, certain key staff positions identified by the member and approved by the pay plan administrator, positions which require student status as a condition of employment, or other classifications as determined by the Chancellor.

Job Description – A broad, general written statement of specific job(s) based on duties, responsibilities, skills, abilities, qualifications, and scope of a position(s). Job Descriptions will be maintained by the System Office for all staff positions.

Job Family – A collection of jobs involving the same type of work but requiring different duties, responsibilities, skills, abilities, qualifications, and scope. Grouping jobs with similar work by job family provides consistent comparison with the market pay rates for similar work.

Job Series – Job profiles with the same title but have different levels or pay grades.

Master Title Table – Current listing of all available titles and attributes

Pay Grade – Pay grades or compensation grades are assigned to each staff job title not listed in the excluded positions. Each pay grade has a salary range associated with it.

Pay Plan Administrator – The designated individual who is responsible for the System-Wide Pay Plan, in collaboration with the Pay Plan Administration Committee.

Position -- A group of duties and responsibilities officially assigned to a specific employee.

Position Descriptions - A written statement of a position based on specific duties, responsibilities, skills, abilities, qualifications, and scope of a position. Position Descriptions will be maintained by System Members.

Staff -- For these guidelines see System Wide Pay Plan Definition or Positions in the System-Wide Pay Plan.

System-Wide Pay Plan – All positions except excluded titles which include board-appointed positions, faculty, faculty administrator and faculty-equivalent positions, as defined by each System Member, key administrator positions, and certain key staff positions identified by the member and approved by the pay plan administrator, positions which require student status as a condition of employment, or other classifications as determined by the Chancellor.

Wage Only Titles (Temporary Casual) – Temporary positions that do not appear in the budget and are funded from a lump-sum budget category. These positions include Student wage positions that require student status as a condition of employment and other positions created to accommodate temporary labor needs and can be given a title from the System-Wide Pay Plan.

[The Texas A&M System-wide Pay Plan](#)



Tarleton's Salary Scale

The Texas A&M System-wide Pay Plan Salary Structure is actually three different salary structures developed to accommodate geographical differences. Tarleton utilizes the “System” structure found here <https://www.tarleton.edu/hr/compensation/paygrade.pdf> A minimum salary is assigned to each pay grade.



Student Employment Pay Plan

The classification descriptions within the Student Employment Pay Plan are intended to provide general information and to be a guide for departments in selecting an appropriate student job title and pay range. These descriptions are not intended to be exhaustive, or prescriptive. Rates of pay for student job titles are listed as well:

https://www.tarleton.edu/hr/compensation/Pay_Plan_Narrative/student-employment.pdf



Graduate Student Employment Pay Plan

The classification descriptions within the Graduate Student Employment Pay Plan apply to graduate students only and, with the criteria outlined for eligibility, are intended to provide general information only and are not intended to be exhaustive, or prescriptive. Rates of pay for graduate student job titles are listed as well: https://www.tarleton.edu/hr/compensation/Pay_Plan_Narrative/graduate-student-employment.pdf



Adjunct Employment Pay Plan

Adjunct faculty are hired temporarily on an “as needed” basis per semester, or in some cases, for an academic year. Adjunct faculty generally do not have full faculty responsibilities, committee assignments, etc. and teaching assignments are based on twenty percent FTE per three credit hour course. Adjunct faculty salary floors are based on highest degree of faculty member and level of course: https://www.tarleton.edu/hr/compensation/Pay_Plan_Narrative/adjunct-faculty-employment.pdf



Temporary Employment Pay Plan

Temporary/Casual job profiles are generally reserved for non-student employees. Only profiles with nonexempt from overtime FLSA status (N) can be used for Temporary/Casual (Non-Budgeted) hourly employment. Waged employees will normally be hired at the stated hourly rate of pay for the appropriate job classification

here: https://www.tarleton.edu/hr/compensation/Pay_Plan_Narrative/non-budgeted-employment.pdf



Creating a New Position

Creating a new position is the process by which a new job is created. Budgeted faculty and staff positions must be complete with a position description, set of standard minimum qualifications and established salary.

Departments and managers may initiate a request for a new position by accessing Tarleton's human resource management system, Workday. Creating a position in Workday requires the initiation of the "Create Position" business process, regardless of the position type (faculty, staff, temporary/casual, student worker, graduate assistant).

Departments initiating a new position request for faculty and staff should be prepared to provide an organizational chart, the position description details and a concise justification including funding information for the new position as a part of the request. Initial funding approval from the divisional vice president is a commitment of funds only. Available funding may influence the development of a position but should not replace the position evaluation process for staff positions.

With a thorough list of position needs (job duties) and work percentages for each, the position request will be submitted through Workday for review by Employee Services. Employee Services will conduct a job study to determine the appropriate job profile, minimum standard qualifications and base minimum salary for the position based on The Texas A&M System Central Pay Plan as well as market comparisons.

[New Position Request Template](#)

[The "Create Position" business process in Workday](#)



Reclassifying Existing Position (Vacant)

Reclassifying an existing vacant position is the process by which an existing position is given a new job profile and default salary. A reclassification may be to a higher, lower, or lateral job profile.

Reclassifying a vacant position in Workday requires the initiation of the "Edit Position Restrictions" business process, regardless of the position type (faculty, staff, temporary/casual, student worker, graduate assistant). A vacant position reclassification represents a significant change in the duties, required skill sets and/or qualifications of the position.

Departments and managers may initiate a request to reclassify a position by accessing Tarleton's human resource management system, Workday. Departments initiating a reclassification request on a vacant faculty or staff position should be prepared to provide an organizational chart, the position description details and a concise justification, including funding information, for the reclassification as a part of the request.

Changes in a position description should be based on departmental needs and not with specific employees in mind. Employee Services will evaluate proposed changes to a position for appropriate job profile, minimum standard qualifications and base minimum salary (default compensation for vacant positions) based on The Texas A&M System Central Pay Plan. If necessary, Employee Services will conduct a job study for market comparisons.

[Position Description Request Template](#)

[The "Edit Position Restrictions" business process in Workday](#)



Promoting Employee to New Position

The Texas A&M University System Regulations [33.99.01 Employment Practices](#) and [33.99.04 Promotions, Transfers and Voluntary Moves](#) provide allowance for promotion of qualified internal candidates to fill positions without posting a notice of vacancy. Procedures are identified in this section for filling budgeted staff positions by internal promotions of budgeted employees.

Basic details regarding faculty salary, tenure and promotion can be found within [Tarleton's Faculty Handbook](#)

Criteria: Employees being proposed for promotion must be currently employed by Tarleton State University in a budgeted position, have education, experience and other qualifications that meet or exceed the minimum required qualifications as documented on the position description, and have been employed in their present position for at least three months. Employees being proposed for promotion must also have a satisfactory record of performance. The divisional vice president may approve exceptions to the three-month requirement.

Approval: Vice presidents have the authority to approve an internal promotion of a budgeted employee to a vacant budgeted position within their division, in lieu of posting a notice of vacancy. The President may serve as the approver for units reporting directly to the President that do not have a vice president, and for promotions and transfers of employees across divisions.

Timing: Any pay change being made in conjunction with a promotion will not be made effective prior to the first day of the pay period in which the promotion request received final approval. From The Texas A&M University System Regulation 31.01.01 *Compensation Administration*: State law prohibits retroactive salary increases. However, when a document approving a salary increase is signed by an individual authorized to approve salary increases, the increase may be effective retroactive to the first day of the pay period in which the final approval was completed.

Rate of Pay: The salary rate of an internally promoted employee will normally be the minimum amount of the position job profile's assigned salary grade. Exceptions are made for director level positions and above which are identified in the System's Central Pay Plan as "commensurate with qualifications." A budgeted employee being considered for internal promotion for a position who has qualifications markedly superior to the minimum requirements for the position may be approved for a salary rate above the minimum amount provided this information is reviewed by Employee Services and thoroughly documented in writing. For director level positions and above, salaries will be based on market comparisons and justified in writing accordingly.

Procedures: Managers considering promotion for a budgeted staff employee to a new or existing position should first consult with Employee Services regarding job duty expectations, appropriate job profile, employee qualifications, and adequate salary justification. Employee Services will additionally review salary expectations for internal equity within the department and across campus. After

Employee Services consultation, promotional consideration should be submitted through administrative channels to the appropriate vice president for verbal or written approval depending on vice president preferences. A well-documented request will provide the name of the budgeted employee, position job profile and identification number (PIN), a brief summary of the job duties and responsibilities of the position, a concise and factual justification statement of qualification of the employee (education, work experience and other credentials and how such qualifications meet or exceed the qualifications documented in the position description), the current minimum and recommended new salary rate, the requested effective date of promotion, and an indication of the source of funds if necessary. Once justification is documented and verbal or written approval is given, the promotional event will be initiated in Workday through a Change Job on the employee and an Edit Position Restrictions on the position if necessary

Other Documentation: As per [Tarleton Rule No. 33.99.14.T1 Criminal History Record Information](#), current employees being considered as a candidate for promotion, transfer or reclassification that requires a position change shall be subject to a criminal history background check. If applicable, a verification of degree and/or licensure or other credential verification will be performed as well.

[Position Description Request Template](#)

[The "Change Job" business process in Workday](#)

[The "Edit Position Restrictions" business process in Workday](#)



Promoting Employee in Current Position (Reclassification)

Procedures are identified in this section for internal promotions of budgeted employees within their current position. This can also be referenced as a reclassification (change in job profile and duties) with a salary increase.

Basic details regarding faculty salary, tenure and promotion can be found within [Tarleton's Faculty Handbook](#)

Criteria: Employees being proposed for promotion within their current position must be currently employed by Tarleton State University in a budgeted position, have education, experience and other qualifications that meet or exceed the minimum required qualifications as documented on the changed position description, and have been employed in their present position for at least three months. Employees being proposed for promotion must also have a satisfactory record of performance. The divisional vice president may approve exceptions to the three-month requirement.

Approval: Vice presidents have the authority to approve an internal promotion of a budgeted employee within their current position. The President may serve as the approver for units reporting directly to the President that do not have a vice president.

Timing: Any pay change being made in conjunction with a promotion will not be made effective prior to the first day of the pay period in which the promotion request received final approval. From The Texas A&M University System Regulation 31.01.01 *Compensation Administration*: State law prohibits retroactive salary increases. However, when a document approving a salary increase is signed by an individual authorized to approve salary increases, the increase may be effective retroactive to the first day of the pay period in which the final approval was completed.

Rate of Pay: The salary rate of an internally promoted employee will normally be the minimum amount of the position new job profile's assigned salary grade. Exceptions are made for director level positions and above which are identified in the System's Central Pay Plan as "commensurate with qualifications." A budgeted employee being considered for internal promotion within position who has qualifications markedly superior to the minimum requirements for the revised position may be approved for a salary rate above the minimum amount provided this information is reviewed by Employee Services and thoroughly documented in writing. For director level positions and above, salaries will be based on market comparisons and justified in writing accordingly.

Procedures: Managers considering promotion for a budgeted staff employee within position should first consult with Employee Services regarding job duty expectations, appropriate job profile, employee qualifications, and adequate salary justification. Employee Services will additionally review salary expectations for internal equity within the department and across campus. After Employee Services consultation, promotional consideration should be submitted through administrative channels to the appropriate vice president for verbal or written approval depending on vice president preferences. A

well-documented request will provide the name of the budgeted employee, position job profile and identification number (PIN), a brief summary of the new job duties and responsibilities of the position, a concise and factual justification statement of qualification of the employee (education, work experience and other credentials and how such qualifications meet or exceed the qualifications documented in the position description), the current minimum and recommended new salary rate, the requested effective date of promotion, and an indication of the source of funds if necessary. Once justification is documented and verbal or written approval is given, the promotional event will be initiated in Workday through a Change Job on the employee and an Edit Position Restrictions on the position.

Other Documentation: As per [Tarleton Rule No. 33.99.14.T1 Criminal History Record Information](#), current employees being considered as a candidate for promotion, transfer or reclassification that requires a position change shall be subject to a criminal history background check. If applicable, a verification of degree and/or licensure or other credential verification will be performed as well.

[Position Description Request Template](#)

[The "Change Job" business process in Workday](#)

[The "Edit Position Restrictions" business process in Workday](#)



Transferring Employee to New Position

The Texas A&M University System Regulations [33.99.01 Employment Practices](#) and [33.99.04 Promotions, Transfers and Voluntary Moves](#) provide allowance for transfer of qualified internal candidates to fill positions without posting a notice of vacancy. Procedures are identified in this section for filling budgeted staff positions by internal transfer of budgeted employees.

Basic details regarding faculty salary, tenure and promotion can be found within [Tarleton's Faculty Handbook](#)

Criteria: Employees being proposed for transfer must be currently employed by Tarleton State University in a budgeted position, have education, experience and other qualifications that meet or exceed the minimum required qualifications as documented on the position description, and have been employed in their present position for at least three months. Employees being proposed for transfer must also have a satisfactory record of performance. The divisional vice president may approve exceptions to the three-month requirement.

Approval: Vice presidents have the authority to approve an internal transfer of a budgeted employee to a vacant budgeted position within their division, in lieu of posting a notice of vacancy. The President may serve as the approver for units reporting directly to the President that do not have a vice president, and for transfers of employees across divisions.

Timing: Any job change being made in conjunction with a transfer will not be made effective prior to the first day of the pay period in which the transfer request received final approval.

Rate of Pay: By definition, a transfer is a move to a new (or existing vacant) position without a change in pay. The salary of an internally transferred employee will normally be comparable to other employee's holding the same job profile. A budgeted employee being considered for internal transfer to a new position must meet the minimum requirements for the position they will hold.

Procedures: Managers considering transfer for a budgeted staff employee to a new or existing position should first consult with Employee Services regarding job duty expectations, appropriate job profile, and employee qualifications. After Employee Services consultation, transfer consideration should be submitted through administrative channels to the appropriate vice president for verbal or written approval depending on vice president preferences. A well-documented request will provide the name of the budgeted employee, position job profile and identification number (PIN), a brief summary of the job duties and responsibilities of the position, a concise and factual justification statement of qualification of the employee (education, work experience and other credentials and how such qualifications meet or exceed the qualifications documented in the position description), the current minimum and current salary rate of the transferring employee, the requested effective date of transfer and who will be the employee's new manager if applicable. Once justification is documented and

verbal or written approval is given, the transfer event will be initiated in Workday through a Change Job on the employee and an Edit Position Restrictions on the position if necessary.

Other Documentation: As per [Tarleton Rule No. 33.99.14.T1 Criminal History Record Information](#), current employees being considered as a candidate for promotion, transfer or reclassification that requires a position change shall be subject to a criminal history background check. If applicable, a verification of degree and/or licensure or other credential verification will be performed as well.

[Position Description Request Template](#)

[The "Change Job" business process in Workday](#)

[The "Edit Position Restrictions" business process in Workday](#)



Adding a Job to an Employee (Dual Employment)

An employee may undertake, on an occasional or sporadic basis, and solely at the employee's option, part-time employment with the System in a different capacity from that in which the employee regularly engages. Exclusively under these circumstances, hours worked in an additional part-time job shall be excluded in assessing hours worked for overtime purposes. Examples of dual employment of this kind are staff who teach adjunct courses, employees hired to work at athletic events, employees hired to work security with the Police Department, faculty hired as advisors or faculty fellows and faculty with 9 month appointments who teach in the summer.

Criteria: All hours worked in a secondary job must be occasional and/or sporadic, worked outside regular work hours from the employee's primary job or worked in a different annual work period from an employee's regular job.

Approval: The Workday routing will ensure that the assigned department head approver of the primary job has opportunity to approve the additional job within in a different department. If a staff employee will be hired as an adjunct for the secondary job, the academic department is responsible for obtaining approvals through the Academic Affairs Office as well as supplying a signed offer letter from the employee.

Timing: The effective date will be the first date an employee works the additional job if paid salary/monthly or the first day the employee works in the additional job and submits a timesheet for those hours.

Rate of Pay: Additional job pay rates will conform to the various Tarleton pay plans for adjunct faculty work, faculty salary or temporary/casual work.

Procedures: The employing department will create a new (or secure an existing vacant) faculty position (if adjunct faculty) or new temporary/casual position (if staff) in Workday before initiating the hire process. If at any time the scheduled hours of the secondary job will overlap the hours of the employee's primary job, the employee will need to secure approval from their primary manager through an Alternate Work Schedule Request Form, or plan to use vacation hours with a statement to that arrangement secured in writing with the primary manager's approval. The "Add Additional Job" business process in Workday is followed to add the secondary job.

Other Documentation: As per [Tarleton Rule No. 33.99.14.T1 Criminal History Record Information](#), current employees being considered for additional employment may be subject to a criminal history background check. If applicable, a verification of degree and/or licensure or other credential verification will be performed as well.

[Alternate Work Schedule Request](#)

[The "Create Position" business process in Workday](#)

The "Add Additional Job" business process in Workday



New Hire

In accordance with [The Texas A&M University System Policy 33.99.01 Employment Practices](#) and [Tarleton SAP 33.99.01.T0.01 Hiring Faculty and Non-Faculty](#) all new hires will follow specified processes before salary offers are made. Staff positions with job profile grades (minimum salary assigned) will post at the minimum monthly amount. Selected candidates will be offered the minimum salary for the position (and job profile) unless justification can be made for a higher salary.

Criteria: Candidates being proposed for new hire must have the education, experience and other qualifications that meet or exceed the minimum required qualifications as documented on the position description and job announcement.

Approval: Vice presidents have the authority to approve new hires and associated salary offers.

Timing: New hire salary effective dates are always the date the employee begins work in the position--the start date.

Rate of Pay: The salary rate of a newly hired employee will normally be the minimum amount of the position job profile's assigned salary grade as posted. Exceptions are made for director level positions and above which are identified in the System's Central Pay Plan as "commensurate with qualifications." A new employee being considered for a posted vacancy who has qualifications markedly superior to the minimum requirements for the position may be approved for a salary rate above the minimum amount provided this information is reviewed by Employee Services and thoroughly documented in writing. For director level positions and above, salaries will be based on market comparisons and justified in writing accordingly. Current Tarleton employees who apply for vacancies through a competitive application process are not guaranteed to maintain their salary at the current level and must be reviewed similarly for salary rates above the position minimum.

Procedures: Managers considering offering candidates a salary above the position minimum should first consult with Employee Services regarding candidate qualifications and adequate salary justification. Employee Services will additionally review salary expectations for internal equity within the department and across campus. After Employee Services consultation, consideration for salary at 10% or higher above the minimum should be submitted by the manager through administrative channels to the appropriate vice president for written approval. A well-documented request will provide the name of the candidate, position job profile and identification number (PIN), a brief summary of the job duties and responsibilities of the position, a concise and factual justification statement of qualification of the candidate (education, work experience and other credentials and how such qualifications meet or exceed the qualifications documented in the position description), the current minimum and recommended hiring salary rate, the proposed hire date and an indication of the source of funds if necessary. Once justification is documented and written approval is given, the offer can be initiated in Workday through the recruiting process.

[New Hire Request Template](#)

[The "Job Application>Offer" business process in Workday](#)



Updating a Position Description

Updating an employee's position description entails making minor changes to their job that are not sufficient to warrant a reclassification to a new job profile. All updates to position descriptions are reviewed by Employee Services to ensure that a new job profile is not warranted. Updating a position description in Workday requires the initiation of the "Edit Position Restrictions" business process.

The following are recommended practices to follow when reviewing and updating position descriptions (PDs) for Tarleton employees using Workday.

Reviewing, Editing and Approving Updates to the Position Description

Updates can be done at any time of year but usually are completed prior to or during the annual performance evaluation period, or prior to creating a job requisition to refill a position.

The Edit Position Restrictions can be initiated by a department or Employee Services. Updates will be reviewed and approved by Employee Services to finalize changes.

It is best to start with the *Position Description Template* when drafting updates to an employee's position description. This format is specifically designed to aid in reading and understanding the different parts of a standard position description.

The Job Description Summary field should be no longer than four sentences. It is intended to be a brief general summary of the position and should be consistent with and reflective of the more detailed duties sections, giving an overview of the level of skill required and scope of responsibility.

Job Duties should be present on both the "Position Restrictions" section and the "Responsibilities" section under the "Qualifications" tab when processing an *Edit Position Restrictions* in Workday. The Position Restrictions will feed to any job postings or advertisements, but the material under the Qualifications tab can be picked up in reporting and will feed to performance evaluations.

There is not a set requirement for the number of duties sections, but a general guideline is that most positions can be appropriately described in 4 to 8 sections of duties. Depending on the position and variety/nature of the duties being performed, it may be necessary to divide the duties into more than 8 sections. Any one duty can have several components to help identify the level and scope of the duty being performed, and therefore identifying the level of the position.

Duties should be grouped into logical sections, with assigned percentages of time for each section of 5% to 50%. Typically, the minimum percentage of time allocated to any one section is 5%. The recommended maximum percentage is 35%, but for some positions HR may allow percentages as high as 75%. The total for all duties should total 100%.

Always include one job duty for "performs other duties as assigned." This job duty should be no more than 5% of time and is designated as non-essential.

A "Duty Title" is a best practice and is used to describe each section of duties. Examples of some commonly-used duty titles include: supervisory, customer service, program/project coordination, administrative support, business support, recruiting, scheduling, professional development, management and training, and other duties.

Required qualifications are the minimum qualifications of education, experience, license/certification, and knowledge, skills and abilities for acceptable performance of the essential functions of the job upon hire.

System Wide Pay Plan job profiles all have minimum required education and experience set which may be modified slightly to reflect specific types of education (such as a Bachelor of Science in Biology) and experience, so long as the level of education and quantity of experience remain consistent with those required by the pay plan and are related to the job performed.

Preferred Qualifications are the secondary qualifications that you would prefer in an applicant/employee, but are not required for performance of the essential functions.

[Position Description Template](#)

[The "Edit Position Restrictions" business process in Workday](#)



Merit Salary Increase

As a general rule merit raises are considered and/or granted once during each fiscal year and in accordance with the criteria listed in [Tarleton Rule 31.01.08.T1 Merit Salary Increases](#) and within the current year budget guidelines approved by the Texas A&M System Board of Regents.

In cases of exceptional job performance, merit raises may be granted at times other than the beginning of the fiscal year. An employee receiving a merit raise outside of the normal budget cycle must meet the criteria described in [Tarleton's Rule 31.01.08.T1 Merit Salary Increases](#). Requests for these increases must be submitted and approved in advance by the department head and divisional vice president. The effective date must be on or after the date of final approval since retroactive salary increases are not allowed.

[Out of Cycle Merit Template](#)

[The "Request Compensation Change" business process in Workday](#)



Administrative Salary Differentials for Non-Academic Interim Positions

Occasionally, positions vital to an organization must be filled immediately on a temporary basis. In such instances, another employee may be temporarily assigned to the vacant position or asked to assume some or all of the responsibilities of the position for lengthy periods of time. An employee placed in an acting or interim status or who is required to assume significant additional responsibilities for an extended period of time may be considered for a temporary salary increase.

[Tarleton SAP No. 31.99.99.T0.03 Administrative Salary Differentials for Non-Academic Interim Positions](#) provides detailed information and recommended pay scale based on program or departmental complexity. Employee Services will further consult on temporary salary decisions.

Temporary compensation may also be paid to employees who perform additional, non-instructional work beyond their normal job responsibilities and in excess of 100% time. Advance written approval from the appropriate department head is required. Circumstances and compensation amounts are additionally subject to the Employee Services review and approval.

Temporary salary increases are typically added to an employee as an allowance with an expected end date or an actual end date, but pending on duration, can be added to base pay.

[The "Request Compensation Change" business process in Workday](#)



Equity Adjustment

Salary adjustments due to equity may include internal salary compression, gender equity adjustments (if any), or other forces which may be beyond the control of a department. As with merit increases, however, equity adjustments should be made during the regular budget cycle whenever possible. All requests for equity adjustments should be supported by strong evidence of need and a compelling argument as to why the adjustment cannot be accomplished during the next regular budget cycle. Employee Services will be consulted on all reviews for salary adjustments due to equity.

[The "Request Compensation Change" business process in Workday](#)



Market Adjustment

Salary adjustments due to market comparisons may be considered upon request of managers and administrators and review by Employee Services. As with merit increases, however, market adjustments should be made during the regular budget cycle whenever possible. All requests for market adjustments should be supported by strong evidence of need and a compelling argument as to why the adjustment cannot be accomplished during the next regular budget cycle.

[The "Request Compensation Change" business process in Workday](#)



Salary Adjustments for Completion of Academic Degrees or Professional Certifications

In accordance with [Tarleton SAP No. 31.99.99.T0.01 Salary Adjustments for Completion of Academic Degrees](#), pay increases may be given to employees who take the initiative through their own efforts to complete a degree or professional certification. Standardized adjustments in salary ensure an equitable recognition of the completion of a bachelor's, master's, doctoral degree or certain professional certifications. Official documentation verifying the degree or certification awarded is required.

Requests may be approved at any time during the fiscal year but should be submitted timely in coordination with completion of degree or certification. Specifically for professional certification, employees must seek pre-approval from the department head up through the appropriate divisional vice president prior to actively seeking or working toward the certification. The employee must show that the certification will promote the credibility of the employee's current profession and the university, requires 30 hours or more of training time, and requires the employee to obtain the certification through the use of their personal time and pay. The Professional Certification Request Form is available for the justification and approval process.

Managers can initiate a *Request Compensation Change* on the employee in Workday. The salary increase is an add to the salary base (not a one-time payment) with the reason "Other Salary Action." Along with the compensation event initiated in Workday, the employee will need to deliver an official transcript to Employee Services before the process can be finalized. The effective date of salary increase will be the first of the month after the evidence is received/verified by Employee Services and request approved by the divisional vice president.

[Professional Certification Request Form](#)

[The "Request Compensation Change" business process in Workday](#)



Allowances

The following are the most common allowances used by Tarleton.

Communications Allowance: Per Tarleton [SAP 25.99.09.T0.01 Communication Allowance](#), this allowance is provided based on employee job responsibilities and must be reviewed by the manager or department head annually. This periodic review is performed to ensure that the employee's position still qualifies for a communication allowance and that the rate is in compliance. A form is required to ensure the employee has read the SAP and acknowledged their responsibilities for certain notifications and understanding of the allowance as it relates to Texas public records requests. To add a Communication Allowance to an employee complete the *Mobile Communication Allowance Enrollment Form- Monthly* and follow the "Request Compensation Change" business process in Workday.

On Call Responsibility: Per [Tarleton SAP 31.01.01.T0.03 On Call Responsibility and Pay](#), this allowance provide appropriate compensation, within the parameters set by a specific campus department or division, to those staff members who are assigned certain "on call" functions, in support of one or more campus operations, that are deemed essential to the functioning of Tarleton that extend beyond standard working hours. Employee Services may periodically review the "flat rate" amount specified in the rule to ensure internal equity and market competitiveness.

Reaching in Excess of 100%: Per Tarleton's Faculty Handbook, [Tarleton Rule 12.03.99.T1 Faculty Academic Workload and Reporting Requirements](#) delineates the expected academic workload for full-time faculty. Occasionally, the need arises for the department head to assign teaching duties above those which are normally assigned. The determination of overload conditions is made by the academic department head and approved by the provost. The compensation, added as a temporary allowance, will be based on the amount normally paid for an overload and will be prorated to include the full period of time involved.

Temporary Interim Increase or Stipend: Occasionally, an employee may acquire temporary additional efforts beyond the scope of their job's responsibilities which warrants compensation as an allowance. For staff, these arrangements are rare and mostly applied when serving as an interim department head (See [Administrative Salary Differentials for Non-Academic Interim Positions](#)) For faculty, these efforts may include serving as a academic program coordinator, serving on a committee, or serving as a temporary department head or assistant department head,

[Mobile Communication Allowance Enrollment Form- Monthly](#)

[Faculty Overload Request Form](#)

[Faculty Handbook; Chapter 2; Teaching Load and Released Time](#)

[The "Request Compensation Change" business process in Workday](#)



Position Description Template

POSITION DESCRIPTION TEMPLATE

INSTRUCTIONS: This template is used to provide justification for creating a new position, reclassifying a vacant position or changing the job (reclassifying, promoting or transferring) of an employee with new or modified job responsibilities. Please complete this template and send to Employee Services prior to initiating a request in Workday.

Justification for new/reclassified position or employee promotion <i>(Summary of department's needs)</i>	
Job Description Summary <i>(A brief summary of the new position or reclassified position)</i>	
Job Responsibilities <i>(Itemize the duties with work percentages to equal 100%; Group duties into 4 or 5 areas; If Changing a current description, show how the duties are being modified by tracking changes)</i>	
%	
%	
%	
%	
%	
Required Education and Experience <i>(Identify the required education and years of experience needed for the new or reclassified position)</i>	
Required Knowledge, Skills and Abilities <i>(Identify the required knowledge, skills and abilities needed for the new or reclassified position)</i>	

POSITION DESCRIPTION TEMPLATE

Supervisory Oversight <i>(Identify if this position will be supervising other employees and how many; identify whether staff, student worker or graduate assistant)</i>	
If supervisory oversight, will this employee have the authority to make hiring, promotional and organizational decisions regarding direct reports?	
If considering promotion, does this employee customarily and regularly exercise discretion and independent judgment and have the authority to make important decisions? Please answer "Yes" or "No"	
If Yes, give percentage of time spent in this capacity:	
What is your proposed salary for this position or for the promoted employee? <i>(Provide a justification for the proposed salary, including in context of the employee's qualifications if proposing promotion)</i>	
How do you plan to fund the budget for this new position or promoted employee?	
What is the proposed effective date for this new position (for posting) or promotion (for employee)?	
If promotion of an employee, please answer the following questions <i>(to ensure compliance with policy and procedure)</i>	

POSITION DESCRIPTION TEMPLATE

Provide Employee Name	
Provide Employee Position (PIN) number	
The employee is currently employed by Texas A&M University in a budgeted position. "Yes" or "No"	
The employee currently meets the required education, experience, and other qualifications for the proposed internal promotion or transfer. "Yes" or "No"	
The employee has been employed in the current position for at least three months. "Yes" or "No"	
The employee has a satisfactory record of performance. "Yes" or "No"	

Position Description Resources

Suggested Action Verbs for Position Descriptions

<https://employees.tamu.edu/compensation/resources/action-verbs/>

See *Updating a Position Description* for recommended best practices in job description detail



Out of Cycle Merit Template

OUT OF CYCLE MERIT TEMPLATE

INSTRUCTIONS: This template is used to provide justification for awarding an employee a merit increase in accordance with System Regulation 31.01.08, *Merit Salary Increases* and ensuring procedures and responsibilities within Tarleton Rule 31.01.08.T1 *Merit Salary Increases* are followed. This form can be attached to a cover memo for required signature.

Please identify the type of merit increase proposed:			
Merit Increase to Base Pay	<input type="checkbox"/>	One-Time Merit Payment	<input type="checkbox"/>
Recommend increase	<input type="checkbox"/>	\$	<input type="text"/>
Employee name	<input type="text"/>		
Department	<input type="text"/>		
Funding Source	<input type="text"/>		
Please identify justification for the merit award by selecting one of the following reasons and providing detailed explanation for consideration			
Employee has demonstrated efficient use of state resources that result in significant savings to the department, Tarleton or the system.	<input type="checkbox"/>		
Employee has demonstrated outstanding service to the department, Tarleton or the system	<input type="checkbox"/>		
Employee has contributed innovative ideas that enhance the operations of the university or create cost-saving opportunities.	<input type="checkbox"/>		
Employee has successfully completed a special project of significant importance to warrant special monetary recognition.	<input type="checkbox"/>		
Justification/Explanation			
<input type="text"/>			

OUT OF CYCLE MERIT TEMPLATE

Please answer the following questions (to ensure compliance with policy and procedure) (to ensure compliance with policy and procedure)	
The employee has been employed with Texas A&M for the past six months immediately preceding the proposed effective date. "Yes" or "No"	
Six months have elapsed since the employee's last merit increase. "Yes" or "No"	
The employee has demonstrated outstanding performance evidenced by an above average or excellent overall rating on a current performance evaluation. "Yes" or "No"	



New Hire Request Template

NEW HIRE REQUEST TEMPLATE

INSTRUCTIONS: This template is used to document justification for a new hire salary. All positions are assigned a minimum salary by the grade assigned to each Job Profile. When hiring new employees above the grade minimum, solid compensation documentation is necessary to ensure best practices in internal salary equity are followed.

Candidate Name	
Position	
Minimum Salary	
Proposed Salary	
Salary Justification <i>(Provide a justification for the proposed salary in context of the candidate's qualifications—education and experience— vs. the position's minimum qualifications)</i>	
Equity Review <i>(Provide a brief summary of how the this proposed salary compares to other similarly situated employees within the department, college or division)</i>	



CREATE POSITION

In Workday, the "Create Position" business process is designed to create a new position under a specific supervisory org. Positions must be created before any requisition can be posted, or any worker can start, with no exceptions.

When initiating, a supervisory organization (manager) must be selected first.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

START SCREEN

Supervisory Organization – Cannot edit, shows supervisory organization selected earlier.

Position Request Reason (several options)

Create New Position - Choose when creating a brand new position to the supervisory org.

Create Replacement Position - Choose when the new position is meant to replace a previous position that was closed.

Job Posting Title – This is the working title of the position and may be different from the official title. This is what will appear in advertisements and on the Worker Profile page once an employee is hired.

Number of Positions – Choose how many of this position you want to create; if creating multiple they will all be identical and will be labeled with a numeral at the end of the job posting title to differentiate them, such as Program Coordinator-1, Program Coordinator-2, etc.

Availability Date – Until this date arrives, the position will be locked with no ability to transfer in an existing employee or to post through a Job Requisition.

Earliest Hire Date – Presumably this would be the same as the availability date as the position will be locked from being able to fill until the date is reached.

Job Family – Not required. If a job family is selected, the next section will display all available Job Profiles within that Job Family. *Note: If a Job Family is selected and then a Job Profile that is not within that Job Family is selected, Workday will not auto populate any position description information until this has been resolved.*

Job Profiles for Job Family - If a job family is selected this will show ALL job profiles within it.

Job Profile – The official position title. If a generic job description exists, selecting the Job Profile will auto populate the summary and description with generic data.

Job Description Summary – A brief summary of the position's purpose and duties. Customization is often necessary.

CREATE POSITION

Job Description – The only space to enter all job information data that will go on a requisition/posting, including duties, qualifications, required knowledge, skills and certifications.

Note: When entering the Job Description, use the Position Description Template to ensure that all the required elements are present.

Location – Stephenville TARLETON; Fort Worth TARLETON, etc.

Time Type – Full time or Part time

Worker Type – Employee *Note: All workers should be listed as Employees.*

Worker Sub-Type – Staff, Faculty, Temporary/Casual Staff, Student, or Graduate Assistant.

Attachments – *Note: DOCUMENTS MAY BE ATTACHED. However, bear in mind that attached memos will not stop Workday from routing the business process all the way to the Executive Approver level even if approvals have already been secured. Also keep in mind that attachments in Workday, although not a records retention document system, will stay in the system forever, with no ability to remove.*

Enter your comment – Although not required, additional detail about why the position is being created is useful for approvers along the routing path—particularly if you do not have supplemental documentation attached.

SUBMIT

After the above material is submitted and reviewed by the HR Partner, the following sub processes will trigger for the security role who initiated the action:

DEFAULT COMPENSATION (Set as minimum under System Wide Pay Plan)

Effective Date & Reason – Shows the earlier selected effective date and reason for processing. This is an uneditable field.

Total Base Pay – This will update automatically when salary data is entered below. This is an uneditable field.

Guidelines *Note: Do not edit this section*

Total Base Pay Range – This will automatically show the full range of the Pay Grade that has been selected. This information will either appear as an annual or hourly rate depending on what has been pre-selected for the Grade Profile.

Compensation Package – This should always say "TAMUS Compensation Package."

Grade – This will automatically display the pay grade associated with the title's job profile.

CREATE POSITION

Grade Profile – This will always be either "System Level Structure" or "System Level Structure (Hourly)" depending on how the employee needs to be paid.

Step – This should always remain empty.

Progression Start Date – This should always remain empty.

Salary (Add a salary plan if monthly paid position)

Compensation Plan – This should always be set to "Salary."

Total Base Pay – This will display the same pay range as listed under Guidelines.

Apply FTE% – This should always be set to "Yes." This allows Workday to automatically apply the employee's FTE to the salary entered.

Amount – This is where the monthly amount should be entered. The Amount Change and Percent Change fields will automatically update if anything is entered here.

Amount Change – If an update to compensation is being made, the department can enter a flat amount to either increase or decrease the existing salary. The Amount and Percent Change fields will automatically update if anything is entered here.

Percent Change – If an update to compensation is being made, the department can enter a percentage to either increase or decrease the existing salary. The Amount and Amount Change fields will automatically update if anything is entered here.

Currency – This should always be set to "USD."

Frequency – For salaried employees, this should always be set to "Monthly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee.

Hourly (Add an hourly plan if hourly paid position)

Compensation Plan – This should always be set to "Hourly."

Total Base Pay – This will display the same pay range as listed under Guidelines.

CREATE POSITION

Amount – This is where the hourly amount should be entered. The Amount Change and Percent Change fields will automatically update if anything is entered here.

Amount Change – If an update to compensation is being made, the department can enter a flat amount to either increase or decrease the existing salary. The Amount and Percent Change fields will automatically update if anything is entered here.

Percent Change – If an update to compensation is being made, the department can enter a percentage to either increase or decrease the existing salary. The Amount and Amount Change fields will automatically update if anything is entered here.

Currency – This should always be set to "USD."

Frequency – For biweekly employees, this should always be set to "Hourly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee.

Allowance – Do not add an allowance to the new position. Opportunity to add an allowance comes when an employee is hired into the position.

Merit – Do not add or alter a merit plan to any position as merit is handled via a separate process.

CHANGE ORGANIZATIONAL ASSIGNMENT FOR WORKER – This sub process will show the effective date and the supervisory organization. There is nothing to fill out or change, just verify and submit.

Company – Verify System Member is correct.

TAMUS System Member Part – Verify member part is correct

CONTINUED ROUTING

A Consolidated Approval goes to HR Partner (Employee Services). After Review/Approval by HR Partner, action flows to Department Head. The Consolidated Approval then routes to Executive Approver.

Final sub process triggers for the initiator:

ASSIGN COSTING ALLOCATIONS (Use this to select source funding)

Please see the Assign Costing Allocation business process job aid. After this, the new position is created.



EDIT POSITION RESTRICTIONS

In Workday, the "Edit Position Restrictions" business process is designed to change the content of an existing position description. When launching, the position being edited must be searched for and selected from a drop-down menu.

For Reclassification of a current employee, this is the first step of a two-step process. Once this is complete, the position will be changed, but the title and payroll salary of the employee inhabiting the position will still need to be changed using the "Change Job" business process. If the position is vacant, "Edit Position Restrictions" is the only step in the process. There is no employee to change so no further business processes are necessary.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

START SCREEN

Position – Cannot edit; shows current PIN, title, and employee (if filled).

Organization – Cannot edit, shows supervisory organization (manager).

Position Change Reason – Edit Position Restrictions

Note: Do not use "Edit Position" reasons

Update Position Restrictions – Updating the duties only.

Update Position Restrictions for Annual Review – Updating the duties during the annual performance evaluation period so the employee receives a notification.

Update Position Restrictions for Change Job Reclassification – Specifically for when a position is being updated as part of a reclassification.

Job Posting Title – The "working" title used when the position is posted in the future

Note: There are three tabs below this: Hiring Restrictions, Qualifications, and History. Hiring Restrictions is used for making changes. Employee Services will make corresponding changes to Qualifications.

Hiring Restrictions (Feeds to Requisition/Posting)

Earliest Hire Date – Presumably this would not be changed, as it will default to when the position was created or last filled (if vacant) and there's no business need to update that to a later date as this will only effect the date on which a position can be posted and filled.

Job Family – Not required. If a job family is selected, the next section will display all available Job Profiles within that Job Family.

EDIT POSITION RESTRICTIONS

Note: If a Job Family is selected and then a Job Profile that is not within that Job Family is selected, Workday will not auto populate any position description information until this has been resolved.

Job Profiles for Job Family – If a job family is selected this will show ALL job profiles within it.

Job Profile – The official position title from the central pay plan. If a generic job description exists, selecting the Job Profile will auto populate the summary and description with generic data.

Special Note: If a new Job Profile is selected (such as when a Reclassification is being processed), the old Job Profile must be deleted. When the old Job Profile is deleted (thus securing the new Job Profile in place), the existing job description is erased and replaced with the generic job description of the new Job Profile that was selected. It is recommended to copy/paste the original job description into a separate text editor or word processing document to keep it for reference when creating the updated job duties for this business process.

Job Description Summary – A brief summary of the position's purpose and duties. Customization is often necessary.

Job Description – The only space to enter all job information data that will go on a requisition/posting, including duties, qualifications, required knowledge, skills and certifications.

Note: When entering the Job Description, use the Position Description Template to ensure that all the required elements are present

Location – Stephenville TARLETON; Fort Worth TARLETON, etc.

Time Type – Full time or Part time

Worker Type – Employee *Note: All workers should be listed as Employees.*

Worker Sub-Type – Staff, Faculty, Temporary/Casual Staff, Student, or Graduate Assistant.

Enter your comment – Although not required, additional detail about the changes being made is useful for Employee Services when approving.

SUBMIT

After the above material is submitted it is reviewed by the HR Partner (Employee Services). Once changes are approved, the following sub processes will trigger for the security role who initiated the action:

DEFAULT COMPENSATION

*Special Note: Edit Position Restrictions triggers the "DEFAULT Compensation Change" business process rather than the regular compensation change. This will only effect the salary rate assigned to the **position**, rather than the employee. Default Compensation is what will automatically populate fields for a position requisition*

EDIT POSITION RESTRICTIONS

when advertising a vacancy. This does not change the salary of the employee. If processing a reclassification with a change in salary, these edits must be followed by a second business process called "Change Job."

Effective Date & Reason – Shows the earlier selected effective date and reason for processing. This is an uneditable field.

Total Base Pay – This will update automatically when salary data is entered below. This is an uneditable field.

Guidelines *Note: Do not edit this section*

Total Base Pay Range – This will automatically show the full range of the Pay Grade that has been selected. This information will either appear as an annual or hourly rate depending on what has been pre-selected for the

Grade Profile – This will always be either "System Level Structure" or "System Level Structure (Hourly)" depending on how the employee needs to be paid.

Step – This should always remain empty.

Progression Start Date – This should always remain empty.

Salary or Hourly (pending which plan is assigned to position)

Note: This default compensation step will automatically remove the compensation on the position. Use the "Backwards" arrow to restore the compensation. If necessary, there may need to be a change in compensation if the employee's salary has increased since the last edits. This will only affect the salary amount encumbered if the position is currently vacant, or when the position becomes vacant in the future.

Amount – If a change needs to be made, this is where the new monthly or hourly amount should be entered. The Amount Change and Percent Change fields will automatically update if anything is entered here.

Special Note: Do not make any other changes to the Salary or Hourly section.

CHANGE ORGANIZATIONAL ASSIGNMENT FOR WORKER – This sub process will show the effective date, the employee (if position is filled), the position being edited and the supervisory organization. There is nothing to fill out or change with this process. Just verify and submit.

ASSIGN COSTING ALLOCATIONS – This step can be skipped in most instances. The Costing Allocation typically does not change with an Edit Position Restrictions.



CHANGE JOB

In Workday, the "Change Job" business process is meant to make a variety of changes to an employee, from transferring to a new position, reclassifying the employee, changing the employee's location, or even modifying the employee's Annual Work period or Scheduled Weekly Hours. This business process will launch a guided step-by-step approach to making employee changes.

"Change Job" may be initiated on its own, or it may be initiated automatically as part of the recruitment process for applicants who are already employees of the Texas A&M System.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

Important Information: The selected reason for a Change Job should be consistent with the predominant purpose for the changes being made on the filled position for the employee. Change Job is a supported retro event for effective dates in the past so that payroll calculations will recalculate for any impacts on the prior payroll periods. Workday requires the effective date be entered at the start of this process, but per state regulations, any change in a state employee's pay may only be made effective retroactively to the start of the pay period in which final approval has been obtained. Due to the time it may take to reach final approval it is highly recommended to select a future date when processing reclassifications. To avoid payroll issues, review the new salary specifications to ensure the change will not place the employee in two different pay groups (biweekly to monthly) at the same time when going from an hourly paid position to monthly paid. The effective date should be at the beginning of the biweekly pay period in which it is approved. This will allow the employee to complete their biweekly term before moving to their monthly designation.

START SCREEN

When do you want this change to take effect? May be effective no earlier than the beginning of the pay period in which the change has been documented as approved.

Why are you making this change?

Employee Transfer – Used when an employee is moving from one position to another position, both of which may be assigned the same salary range, job profile or organizational level within the same or different system member part or Company. *Note: This reason is most often used when an employee is selected for another job through the Workday recruiting process.*

Promotion New Position – Used when an employee is moving from one position to another position requiring higher qualifications, higher rate of pay and a job profile change.

CHANGE JOB

Promotion Reclassification – Used when the job duties or responsibilities of an employee’s current position are reevaluated and the same position is assigned to a different job profile requiring higher qualifications and a higher rate of pay. The *Edit Position Restrictions* process should be completed and approved on the position prior to initiating *Change Job* for the employee.

Demotion New Position – Used when employee is moving from one position to another position with a lower pay range, a job profile of lower status, and perhaps requiring less education, experience or responsibility. Any action considered a demotion must be discussed with Employee Services before proceeding.

Demotion Reclassification – Used when the job duties or responsibilities of an employee’s current position are re-evaluated and the same position is assigned to a different job profile with a lower pay range a job profile of lower status, and perhaps requiring less education, experience or responsibility. Any action considered a demotion must be discussed with Employee Services before proceeding. The *Edit Position Restrictions* should be completed and approved on the position prior to initiating *Change Job* for the employee.

Data Changes

Hours or Work Period Change – Used when changing the employee’s scheduled weekly hours (FTE %) and/or their assigned annual work period without any other employee or position changes.

Job Classification Change – Used when changing a job classification (job attributes) of the same position without any other employee or position changes. Job classification changes are not recommended to be used by any entity other than Employee Services. *Note: Job classifications are job profile attributes that can be overridden at the position level include: Campus Security Designation, Hazard Duty Pay Eligible Flag, Longevity Eligible Flag, Overtime Flag and Term Appointment.*

Location Change – Select if changing the location of the employee.

Position Reclassification – Used when changing the job profile of the same position as a result of reevaluating the job duties of an employee’s position, or making any combination of other data changes *that do not result in the employee being assigned to a lower or higher salary range and/or title that would be considered a promotion or demotion.* The *Edit Position Restrictions* should be completed and approved on the position prior to initiating *Change Job* for the Employee.

Position Title Change – Used when changing the position title in the same position, without changing the job profile. It could be that we want to better identify the work of the employee whose position currently has a generic job profile. Position Title Change should not be used for reclassification, promotion or demotion of faculty or staff.

Note: This reason may be also be used to do the following: change the job profile and title for student workers and graduate assistant workers to comply with financial aid or grant funding changes and to preserve the

CHANGE JOB

working relationship with student workers or graduate assistants after graduation without a change in qualifications or rate of pay.

Who will be the manager after this change? Will auto populate with current manager for the position in question. Update if manager for the new position or existing vacant position differs from the current manager. If reason is reclassification, do not change the manager.

Which team will this person be on after this change? Will auto populate from previous question. Update if manager for the new position or existing vacant position differs from the current manager.

Where will this person be located after this change? Only change if doing a data/location change for employee.

Do you want to use the next pay period? If selected, will default effective date to the next pay period. Uncheck box if you are using a date other than the next pay period.

SELECT START

MOVE This appears when employee is being moved from current position to “new” (another) position.

What do you want to do with the opening left on your team?

I plan to backfill this headcount – Select if former manager intends to fill vacant position left behind.

Move this headcount to the new manager – Select if the whole position is being moved to a new manager.

Close this headcount – Select if employee is moving and the old position is simply being closed.

Special Note: Positions that are marked closed are eliminated and cannot be retrieved at any level.

JOB This section may only be available to the receiving manager when employee is being moved from current position to “new” (another) position if manager initiates.

Position – Will default to current position. Select appropriate position if employee is being transferred; only viable vacant positions under new manager will display here. If employee is being reclassified and not transferred, skip this.

Do you want to create a new position? – **Do not check this.** Use the Create Position process for all new positions. New positions created with this process will not route correctly.

Job Profile – If employee is being transferred to a new position, details for the new position will display here; if employee is being reclassified, please change this to the proposed job profile.

Job Title - Auto populates from job profile. May be different from job profile as long as it is not a higher or lower title or another existing title in the System-wide Pay Plan. Primarily used for future postings.

CHANGE JOB

Business Title – Auto populates from job title and will display on worker profile.

LOCATION

Location – Verify that physical location of employee is correct.

Scheduled Weekly Hours – Default is 40; if this is changed, it will change the FTE of the position.

DETAILS

Additional Job Classifications – A place to add any new details to the position, like EEO, FLSA Code, ORP Eligibility, and etc.; DO NOT MAKE ANY CHANGES HERE UNLESS PROMPTED.

Employee Type – Will show appropriate type, such as staff, faculty, temporary/casual, student, graduate assistant

Time Type – If scheduled weekly hours is 40, this will only show Full time, otherwise can be switched to Part time. *Note: Must match the time-type on the position. If time type does not match, you will need to submit Edit Position Restrictions – Update Position to update the time type on the position and then submit a Change Job to update the time type for the employee.*

Pay Rate Type – Salaried or Hourly

Location Weekly Hours – The actual number of hours the employee is working. Also called “Scheduled Weekly Hours.”

Default Weekly Hours – The number of hours to be considered full time; please leave at 40. DO NOT CHANGE. This affects FTE calculation.

FTE – Will automatically calculate based on default and location specific weekly hours.

Job Exempt – Cannot be changed unless job classifications and other data changes to allow for a status other than the default for Job Profile; Should not be touched by anyone other than Employee Services.

Job Classifications – The default Job profile attributes set up with the original position creation; cannot be edited.

Management Level – Cannot be edited.

Company Insider Types – UNUSED.

Workers’ Compensation Code from Job Profile – Cannot be edited.

Workers’ Compensation Code Override - UNUSED.

End Employment Date – Will only appear and require a date if position is designed to be temporary.

CHANGE JOB

First Day of Work – Same as the effective date.

Notify By – Select date Workday will notify employee of change. Nothing will appear in worker's view of history or profile until this date.

Annual Work Period – Allows for selection of specific work periods (semesters or months) for employment; default for staff will be 12 month.

Work Period Percent of Year – Automatically calculated based on Annual Work Period.

Disbursement Plan Period – Will be prompted to match Annual Work Period.

ATTACHMENTS

Note: DOCUMENTS MAY BE ATTACHED. However, bear in mind that attached memos will not stop Workday from routing the business process all the way to the Executive Approver level even if approvals have already been secured. Also keep in mind that attachments in Workday, although not a records retention document system, will stay in the system forever, with no ability to remove.

ORGANIZATIONS

Company – Verify System Member is correct.

TAMUS System Member Part – Verify System Part is correct

COMPENSATION

Employee Visibility Date - Indicates when the employee can see this change in their own worker history.

Total Base Pay – This will update automatically when salary data is entered below. This is an uneditable field.

Guidelines *Note: Do not edit this section*

Pay Range – This will automatically show the full range of the Pay Grade that has been selected. This information will either appear as an annual or hourly rate depending on what has been pre-selected for the Grade Profile.

Compensation Package – This should always say "TAMUS Compensation Package."

Grade – This will automatically display the pay grade associated with the title's job profile.

Grade Profile – This will always be either "System Level Structure" or "System Level Structure (Hourly)" depending on how the employee needs to be paid.

Step – This should always remain empty.

Progression Start Date – This should always remain empty.

CHANGE JOB

Salary (Add a salary plan if monthly paid position)

Compensation Plan – This should always be set to "Salary."

Total Base Pay – This will display the same pay range as listed under Guidelines.

Apply FTE% – This should always be set to "Yes." This allows Workday to automatically apply the employee's FTE to the salary entered.

Amount – This is where the monthly amount should be entered. The Amount Change and Percent Change fields will automatically update if anything is entered here.

Amount Change – If an update to compensation is being made, the department can enter a flat amount to either increase or decrease the existing salary. The Amount and Percent Change fields will automatically update if anything is entered here.

Percent Change – If an update to compensation is being made, the department can enter a percentage to either increase or decrease the existing salary. The Amount and Amount Change fields will automatically update if anything is entered here.

Currency – This should always be set to "USD."

Frequency – For salaried employees, this should always be set to "Monthly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee. Please contact Employee Services before applying an actual end date to budgeted faculty or staff positions.

Hourly (Add an hourly plan if hourly paid position)

Compensation Plan – This should always be set to "Hourly."

Total Base Pay – This will display the same pay range as listed under Guidelines.

Amount – This is where the hourly amount should be entered. The Amount Change and Percent Change fields will automatically update if anything is entered here.

Amount Change – If an update to compensation is being made, the department can enter a flat amount to either increase or decrease the existing salary. The Amount and Percent Change fields will automatically update if anything is entered here.

CHANGE JOB

Percent Change – If an update to compensation is being made, the department can enter a percentage to either increase or decrease the existing salary. The Amount and Amount Change fields will automatically update if anything is entered here.

Currency – This should always be set to "USD."

Frequency – For biweekly employees, this should always be set to "Hourly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee. Please contact Employee Services before applying an actual end date to budgeted faculty or staff positions.

Allowance

Compensation Plan – This is where you will select the type of allowance you wish to give to the employee (example: Cell Phone Service Allowance, Department Head Stipend, etc.). If an employee currently has an allowance, it will carry over to the Change Job, but Workday will want to cancel it. Use the "backwards" arrow to restore existing allowances that need to remain with the employee.

Amount – This is where you enter the monthly amount of the allowance being offered. Some allowances are not prorated, but paid once per month if existing on day payroll is calculated.

Currency – This should always be set to "USD."

Frequency – This should always be set to "Monthly."

Additional Details – Clicking this will reveal hidden, optional fields. Please note that Allowances do not conform to the Annual Term Period so the fields contained here may be necessary if there are specific periods in which the allowance will not be earned.

Expected End Date – A date can be entered if you expect the allowance will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate the allowance payment on that date. It will remove the entire allowance plan from the employee.

CHANGE JOB

Merit

Do not add or alter a merit plan to any position as merit is handled via a separate process.

Special Note for Compensation: During the "Change Job" process, regardless of the reason for initiating it, Workday may delete out the salary and/or allowances for the employee. You will know this has happened if "Total Base Pay" reads \$0.00. Under the "Salary", "Hourly", or "Allowances" section, if you see Red X's, please make sure to click the "backwards" arrow button on that section to RESTORE these amounts. Double check this has been done by reading "Total Base Pay." The "Total Base Pay" should never be \$0.00.

CONTINUED ROUTING

Routing may differ depending on who initiates business process. Any onboarding activities required as a result of changes made during this business process should route to the employee and/or other security roles as needed.

Continued Routing if Transfer and current HR Contact initiates: Consolidated review goes to Receiving Manager (new manager); Consolidated review goes to HR Partner; Consolidated review goes to Receiving Department Head

Continued Routing if Transfer, and new HR Contact initiates: Consolidated review goes to Current Manager; Consolidated review goes to Receiving Manager (new manager); Consolidated review goes to HR Partner; Consolidated review goes to Receiving Department Head

If Change Job Type is labeled a Promotion, Demotion or Reclassification it will route further to the Executive Approver.

POSSIBLE ADDITIONAL ROUTING AND SUBPROCESSES

Offboarding Procedure "To Do" for Current HR Contact if there is a change in location, company or supervisory Organization.

Determine Time Off Payout for Change Job "To Do" for Current Absence Partner to evaluate the potential payout for any Time Off balance when changing from a benefits-eligible position to non-benefits eligible position.

Assign Roles "To Do" for Current HR Contact. Guidance for *Assign Roles* is provided below.

Onboarding Procedure "To Do" for New HR Contact if the worker's new job has location, company or supervisory organization changed.

Assign Pay Group "To Do" for Payroll Partner if the new worker's job position or pay rate type, or company changed.

CHANGE JOB

Update Position Restriction Costing Allocation and Update Position Restriction Default Compensation “To Do” for current HR Contact on the vacated position (if Change Job results in an employee vacating a position and the position is left open (for faculty, staff or graduate assistant worker types).

Assign Costing Allocation – The initiator will receive the Assign Costing Allocation if the worker is not changing Supervisory Organizations; otherwise, it is routed to the HR Contact supporting the new Supervisory Organization if the worker is moving to a different Supervisory Organization.

Multiple “To Do” actions for Benefits Partner, as applicable.

GUIDANCE FOR ASSIGN ROLES

The Assign Roles sub-process routes to the Current HR Contact and will list all current security roles the employee possesses. It will show old values and new values for employee transfer, so the inbox recipient can see the old title, manager, and supervisory organization, as well as the new title, manager, and supervisory organization. The following are options for how to handle the employee’s existing security roles in Workday:

Transfer role assignments from old position to new position (employee will take all security roles with them, leaving none behind in the old position)

Copy role assignments from old position to new position (employee takes all security roles with them, and leaves the same security roles behind in the old position)

Copy role assignments to new position from _____ (allows recipient to select a position to copy security roles from; leaves old security roles with original position)

Remove role assignments from old position (employee will inherit whichever security roles are already attached to the new position; all security roles will be stripped from the old position)

None of the above (employee will inherit whichever security roles are already attached to the new position; all security roles will remain the same in the old position) *This is the most likely used option*

Once the choice is made, the sub-process will provide a full listing of all security roles being moved, copied, or erased, for final review and submission. Once submitted, this sub-process routes to Role Maintainer for review and approval.

ASSIGN COSTING ALLOCATIONS

If costing allocations need to be changed and this process does not automatically flow to your inbox, please search for "Assign Costing Allocations" and enter in only the employee data in the top section (the bottom section is only for position data and you can only enter one or the other). Then launch. If source funding is not changing in any way, skip to end. Please see the Assign Costing Allocation business process job aid. After this, action is completed.



The "Add Additional Job" business process in Workday

ADD ADDITIONAL JOB

In Workday, the "Add Job" business process is meant to add any additional job when employee is already working. The effect is to put the employee in a dual employment status. This must be completed in any situation where an employee is currently working at the university. Even if the additional job will be considered the employee's primary job, this process must first be completed, then a second business process called "Switch Primary Job" must be run to set the employee's multiple positions in the correct order.

"Add Job" may be initiated on its own, or it may be triggered automatically as part of the recruiting process for applicants that are current employees of the Texas A&M System.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

START SCREEN

Supervisory Organization – Choose the supervisory org within which the vacant position is located.

Employee – If this was initiated off of the worker profile, the employee will already be filled out; If the BP was initiated from search results, select the employee for whom a job is being added.

NEXT SCREEN

Effective Date – The date on which the employee will start their additional job.

Reason

Add Additional Employee Job, New Position – Select if the position being added is new and has never had an employee in it before.

Add Additional Employee Job, Vacant Position – Select if the position being added is a vacancy that used to have an employee in it.

Position – Select the position being added; the options will only display vacant positions under the supervisory org originally selected that are available on the effective date indicated. Once position is selected, the other items will automatically fill in with data from the position.

Employee Type – Staff, Faculty, Temporary/Casual Staff, Student, or Graduate Assistant.

Job Profile – This is the position's official title.

Time Type – Full time or Part time.

Location – Stephenville TARLETON; Fort Worth TARLETON, etc.

Pay Rate Type – Hourly or Salaried



REQUEST COMPENSATION CHANGE

In Workday, the "Request Compensation Change" business process is designed to request any change in compensation for a worker outside of Change Job Promotion, Promotion/Reclassification or Transfer to another position. It encompasses a wide variety of salary changes such as market or equity increases, allowances, faculty overloads, interim stipends, job related skill enhancement pay and other temporary salary adjustments.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

START SCREEN

Effective Date – The date on which the compensation change will be effective.

Use Next Pay Period – If this is selected, the effective date will automatically set as the beginning of the next pay period from when the process was initiated.

Reason

Across the Board – Used if Tarleton decides to increase the minimum salary for everyone in a specific category. This is not a reason initiated by anyone other than by Employee Services.

Allowance Adjustment – Used to add, remove or modify an allowance for the worker.

Counter Offer – Used in situations when an approved counter offer has been granted to a worker. This is not a reason initiated by anyone other than by Employee Services.

Decrease – A generic decrease in salary. Most often used when ending a temporary salary increase that was not processed as an allowance.

Equity Adjustment – Used after requesting an equity review that has been reviewed and approved by Employee Services; will require necessary documentation.

Hiring Salary Adjustment – Used when requesting a hiring salary adjustment for a newly hired worker.

Increase – A generic increase in salary. Please check with Employee Services before using this reason to ensure no other reason is more appropriate. All increases in salary must match accepted System and University regulations.

Mandated Across-the-Board Increase – The same as a regular Across the Board increase, but this one would be mandated by the State of Texas rather than Tarleton. This is not a reason initiated by anyone other than by Employee Services.

REQUEST COMPENSATION CHANGE

Merit Increase, Outside Budget Cycle – Used when requesting a merit raise outside of the regular cycle that has been reviewed and approved by Employee Services; will require necessary documentation.

Merit Increase, Regular Budget Cycle – Only used in situations when a worker is incorrectly missed during Workday's built in budget and merit process.

Merit Plan Assignment/Removal – Only used by Employee Services when a Merit Plan needs to be removed from an employee's compensation.

Minimum Wage Increase – Used when raising employee's hourly wage up to a newly approved federal minimum wage.

Other Salary Action – Please check with Employee Services before using this to see if the salary change qualifies. Used when requesting a job related skill enhancement pay for a worker (increase due to degree or certification obtainment).

Pay Plan Adjustment – Used whenever there is an increase in minimums within the System-Wide Pay Plan. This is not a reason initiated by anyone other than by Employee Services.

Temporary Salary Increase – Used to grant a temporary salary increase to the base pay. However, temporary increases are typically assigned as an allowance instead and with an Expected End Date or Actual End Date based on how it is approved.

NOTE: The temporary increase may be set up as a monthly allowance for monthly paid positions. To set up a monthly allowance, go to the Allowance section and select Temporary/Interim Increase for the Compensation Plan and enter the monthly increase in the Amount field. Do not use allowance to set up a temporary increase for hourly paid positions. The temporary increase should be applied to the current hourly rate for hourly paid positions.

Employee – If the business process was initiated from worker profile, this will automatically be filled in; if the business process was initiated on its own, select the employee receiving a compensation change.

NEXT SCREEN

Effective Date & Reason – Shows the earlier selected effective date and reason for processing.

Employee Visibility Date – Set date that the employee can see this change on their worker profile/history.

Total Base Pay – This will update automatically when salary data is entered below. This is an uneditable field.

REQUEST COMPENSATION CHANGE

Guidelines *Note: Do not edit this section*

Pay Range – This will automatically show the full range of the Pay Grade that has been selected. This information will either appear as an annual or hourly rate depending on what has been pre-selected for the Grade Profile.

Compensation Package – This should always say "TAMUS Compensation Package."

Grade – This will automatically display the pay grade associated with the title's job profile.

Grade Profile – This will always be either "System Level Structure" or "System Level Structure (Hourly)" depending on how the employee needs to be paid.

Step – This should always remain empty.

Progression Start Date – This should always remain empty.

Salary (Make changes to the salary plan if monthly paid position)

Compensation Plan – This should always be set to "Salary."

Total Base Pay – This will display the same pay range as listed under Guidelines.

Apply FTE% – This should always be set to "Yes." This allows Workday to automatically apply the employee's FTE to the salary entered.

Amount – This is where the monthly amount should be changed. The Amount Change and Percent Change fields will automatically update if anything is entered here. Calculate an annual salary increase by dividing additional amount by number of months in the annual work period.

Amount Change – With the update to base salary compensation being made, the department can enter a flat amount to either increase or decrease the existing salary. The Amount and Percent Change fields will automatically update if anything is entered here.

Percent Change – With the update to base salary compensation being made, the department can enter a percentage to either increase or decrease the existing salary. The Amount and Amount Change fields will automatically update if anything is entered here.

Currency – This should always be set to "USD."

Frequency – For salaried employees, this should always be set to "Monthly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect the base salary compensation to terminate in the future. This field will not automatically terminate payment.

REQUEST COMPENSATION CHANGE

Actual End Date – Any date entered here will automatically terminate all base salary payment on that date. It will remove the entire compensation plan from the employee. Please contact Employee Services before applying an actual end date to budgeted faculty or staff positions (with exception of Summer Faculty appointments).

Hourly (Add an hourly plan if hourly paid position)

Compensation Plan – This should always be set to "Hourly."

Total Base Pay – This will display the same pay range as listed under Guidelines.

Amount – This is where the hourly amount should be entered. The Amount Change and Percent Change fields will automatically update if anything is entered here.

Amount Change – With the update to base salary compensation being made, the department can enter a flat amount to either increase or decrease the existing salary. The Amount and Percent Change fields will automatically update if anything is entered here.

Percent Change – With the update to base salary compensation being made, the department can enter a percentage to either increase or decrease the existing salary. The Amount and Amount Change fields will automatically update if anything is entered here.

Currency – This should always be set to "USD."

Frequency – For biweekly employees, this should always be set to "Hourly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee. Please contact Employee Services before applying an actual end date to budgeted faculty or staff positions.

Allowance (Add, remove or modify an allowance plan as needed)

Compensation Plan – This is where you will select the type of allowance you wish to add to the employee (example: Cell Phone Service Allowance, Department Head Stipend, etc.). If an employee currently has an allowance, you can remove it or make changes if required.

Amount – This is where you enter the monthly amount of the allowance. Some allowances are not prorated, but paid once per month if existing on day payroll is calculated.

REQUEST COMPENSATION CHANGE

Currency – This should always be set to "USD."

Frequency – This should always be set to "Monthly."

Additional Details – Clicking this will reveal hidden, optional fields. Please note that Allowances do not conform to the Annual Term Period so the fields contained here may be necessary if there are specific periods in which the allowance will not be earned.

Expected End Date – A date can be entered if you expect the allowance will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate the allowance payment on that date. It will remove the entire allowance plan from the employee.

Merit

Do not add or alter a merit plan to any position as merit is handled via a separate process.

ATTACHMENTS

Note: DOCUMENTS MAY BE ATTACHED. However, bear in mind that attached memos will not stop Workday from routing the business process all the way to the Executive Approver level even if approvals have already been secured. Also keep in mind that attachments in Workday, although not a records retention document system, will stay in the system forever, with no ability to remove. Use with caution regarding any protect information that may be included.

CONTINUED ROUTING

Business process routes to HR Partner/Compensation Partner for review. Consolidated review goes to Manager. Consolidated review goes to Department Head. Consolidated review goes to Executive Approver.

Final sub process triggers for the initiator:

ASSIGN COSTING ALLOCATIONS (Use this to select source funding)

Please see the Assign Costing Allocation business process job aid. After this, the new position is created.



The "Assign Costing Allocations" business process in Workday

ASSIGN COSTING ALLOCATION

In Workday, the "Assign Costing Allocation" business process is designed to change or adjust source funding accounts for an employee or a vacant position. This business process may be initiated on its own, or it may be a sub-process of another transaction, such as Change Job, Create Position, Request Compensation Change or Edit Position Restrictions.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

START SCREEN

This screen will only be seen if the "Assign Costing Allocation" business process is initiated as a standalone process. If this business process is triggered automatically as a sub-process in the Workday inbox, the information seen will be under "NEXT SCREEN."

Worker Costing (Only use if changing accounts for employee)

Worker – Search for and select the employee who needs a payroll account change.

Position – This field should automatically populate with the correct PIN and title.

Earning – This field is designed to change or assign a funding account to a stipend or allowance that an employee may regularly receive. If a specific allowance is selected in this field, the next screen will only edit funding for that allowance and will not affect the accounts associated with an employee's regular base pay. If an employee receives no allowances that require editing, this may be left blank.

Position Restrictions Costing (Only use if changing accounts for a vacant position)

Effective Date – Select the date you wish the account changes to take effect.

Position Restrictions – Search for and select the vacant position you wish to update source funding for. The fastest way is to search by PIN.

NEXT SCREEN

Depending on whether editing for a vacant position or an employee, this will display both the employee's name and position (if updating employee), or it will just display the position (if updating a vacant position).

If the rest of the screen is blank, please click "Add" to add a new costing allocation section. You should then see the following fields within your first section:

ASSIGN COSTING ALLOCATION

Copy Costing Allocation – If this checkbox is selected, the contents of the entire costing allocation section will be duplicated, creating a new space to set up accounts for a specific time period. This can be useful if accounts are changing often, but a few accounts remain consistent throughout each time period. Only use this when setting up changing accounts over multiple time periods.

Note: When "Copy Costing Allocation" is clicked, the newly created costing allocation section will default a start date with today's date, which can then be edited.

Start Date – The date that funds will begin to be allocated to the person or position.

End Date – Optional - if account will carry over year to year, leave this blank. Only end if there is another account taking over payment. Accounts do not need to close at the end of the fiscal year. If no end date is entered, Workday knows to continue using the accounts in this section going forward.

Costing Allocation Attachments (if nothing under this section, please click the "+" symbol. May click "+" for as many rows of accounts as needed)

Order – May use this to change the order the accounts appear in. The order of displayed accounts has no bearing on how much funds are withdrawn or the timeline in which they are withdrawn. It is only a visual change.

Default (as of start date) – Not used.

Required with no default (Must have costing override) – Not used.

Worktags – Search for and select the source funding account. When searching accounts, must include the system part and subaccount with dashes separating (ex: 04-120400-10000).

Distribution Percentage – Defaults to 100%, must change if several accounts are paying portions of salary.

Special Note: May add as many costing allocation sections as required (to indicate where some accounts may begin and end). Every costing allocation section must add up to 100% distribution, even if the FTE of the employee is less than 100%. Cost Allocations in Workday are designed to indicate how much funding is being withdrawn to cover the entire Total Base Pay. So, for example, for an employee making \$1000/month at 50% effort, Workday needs to know how much of this total \$1,000 is being taken from each account per month. So if the employee is paid evenly out of two accounts, the Cost Allocation would read: Account 1 - 50%, Account 2 - 50%, and based on this Workday knows the employee is paid \$500 out of Account 1 and \$500 out of Account 2. The system will not allow you to enter accounts that do not total to 100% coverage.

ASSIGN COSTING ALLOCATION

If needed, click the "Add" button (or click the "Copy Costing Allocation" checkbox) to add an entire new costing allocation section. Each section requires a start date and Workday will verify that there is full coverage from your selected accounts over the course of the fiscal year. If you accidentally click the "Add" button, you can click "Remove" to eliminate a costing allocation section.

Example: From 9/1 to 12/31, Joe Employee has two accounts, each distributing at 50%. Account 1 - 50%, and Account 2 - 50%

Starting on 01/01, Account 2 will cease and be replaced by Account 3, and the distribution will also change. So from 01/01 to the end of the year, Joe Employee is paid from: Account 1 - 70%, and Account 3 - 30%.

Both of these sections add up to 100%, and when looked at back-to-back, constitute full coverage for the entire year.

If there is no End Date entered for the second Cost Allocation Section (which began on 01/01), then Workday knows that these accounts will be continuing all the way past 8/31 into the next fiscal year, unless otherwise indicated. This is why all the date fields also include the year.

CONTINUED ROUTING

Approval step goes to Cost Center Approver (usually Department Head, but not always). Approval step goes to Payroll Partner. After this, Assign Costing Allocation process is complete.

MORE ABOUT COSTING ALLOCATIONS on next page

ASSIGN COSTING ALLOCATION

How to Find Compensation and How to Find Pay Details



Compensation

View Compensation from "Compensation" tab on employee profile; the details show differences in *Total Salary & Allowances* and *Total Base Pay*



Pay

View Pay details from "Pay" tab on employee profile; *Results*, *Payslips* and *Costing Allocations*

View Costing Allocation from the same "Pay" tab on employee profile; Current and Future Costing Allocations for *Position Restrictions*, *Worker Position* and *Worker Position Earning*

Worker Costing vs. Position Restrictions Costing

Use *Worker Costing* but only select "Worker" and "Position" if you are changing the cost allocation of the filled position and only the cost allocation of the base salary

Use *Worker Costing* but select the "Earning" (using the drop down) along with the "Worker" and "Position" if you are changing the cost allocation of the filled position and only the cost allocation of the earning (also known as an "Allowance")

Use the *Position Restrictions Costing* only if you are changing the cost allocation of a vacant position (its "Position Restrictions") or changing the cost allocation in advance of a position becoming vacant; Always "Effective Date" specific

How to Assign a Costing Allocation

View Costing Allocation from same "Pay" tab on employee profile; Select *Costing Allocations* and use the "Maintain" button

Or

Initiate the "Assign Costing Allocation" business process off the employee's profile "Actions" button and "Payroll" tab

Or

Use the search bar to search "Assign Costing Allocation" and initiate from the prompt

Or

"Assign Costing Allocation" is prompted as a task in your Inbox from an overall business process; Change Job, Add Job, End Job, Termination, Hire, etc.

What You Need to Know About Costing

"Worker and Position" can be costed differently than "Earnings" or "Position Restrictions"

Vacant Position Costing Allocations can be difficult to find (these are *Position Restrictions Costing Allocations*)

Use the *All Position Restrictions Costing Allocations* report

Or

Initiate an "Assign Costing Allocation" off the actions button on a vacant position BUT cancel the event before submitting

The "Job Application>Offer" business process in Workday

JOB APPLICATION>OFFER

In Workday, the "Job Application" business process is designed to move a candidate through the recruiting process each step of the way from *Job Application>Initial Review>Screen>Interview>Reference Check>Offer>Background Check>Ready for Hire*. This instruction addresses the Offer stage only to ensure that protocols are followed for proposed salary approval.

Below is a text-only guide to using this business process at Tarleton. For a job aid that includes images, please visit "Workday Help" at <https://it.tamus.edu/workdayservices/?target=All-Job-Aids>. You will be prompted to sign in through Single Sign On (SSO).

INITIATE OFFER FOR

Note: When a candidate is moved to the Offer stage, the Manager, Recruiting Coordinator or Recruiting Partner can perform this step. Typically before this step is submitted the manager has issued a verbal offer based on contingencies such as satisfactory background check, verification of degrees and salary approvals.

DETAILS

Target Hire Date (Job Requisition) – Cannot edit, shows original target date

Hire Date – Enter the verbally agreed upon start date. This date must conform to a regularly scheduled New Employee Orientation date if 12 month employee or a standard faculty start date if 9 month employee. The hire date must be at least 2 weeks from date of offer to allow for post-offer processes to complete. Call Employee Services if you have questions about the start date.

Hire Reason – Select *Hire > New Hire* as the reason.

JOB DETAILS

Job Profile – Cannot edit, shows the Job profile for the position. If there is any reason for the Job profile for hire to be different from the Job profile of the position, contact Employee Services.

Business Title – Be sure to include the correct business title for the employee in the position. It may not be exactly the same as the Job Profile for the position, but will default to the Job profile with this process.

WORK HOURS

Cannot edit, shows the hour details assigned to the position.

NEXT – TOTAL BASE PAY

Total Base Pay – This will display the monthly or hourly pay as advertised in the Job Requisition unless the pay was removed and replaced with "Commensurate with Qualifications." This field will automatically update when the pay is added or changed below on the plan.

GUIDELINES

Note: Do not edit this section

Total Base Pay Range – This will automatically show the full range of the Pay Grade associate with the position's Job Profile. This information will either appear as an annual or hourly range.

Compensation Package – This should always say "TAMUS Compensation Package."

Grade – This will automatically display the pay grade associated with the title's job profile.

Grade Profile – This will always be either "System Level Structure" or "System Level Structure (Hourly)" depending on how the employee needs to be paid.

Step – This should always remain empty.

Progression Start Date – This should always remain empty.

Salary (Add, modify or leave as is the salary plan if monthly paid position)

Compensation Plan – If adding, select "All Compensation Plans" and "Salary." This should always be set to "Salary."

Total Base Pay Range – This will display the same pay range as listed under Guidelines.

Apply FTE% – This should always be set to "Yes." This allows Workday to automatically apply the employee's FTE to the salary entered.

Amount – This is where the monthly amount should be entered, modified, or left as is, pending on verbal offer.

Currency – This should always be set to "USD."

Frequency – For salaried employees, this should always be set to "Monthly."

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee. Do not add an actual end date for salary unless you are absolutely sure the position will end.

Hourly (Add, modify or leave as is the hourly plan if hourly paid position)

Compensation Plan – If adding, select “All Compensation Plans” and “Hourly.” This should always be set to “Hourly.”

Total Base Pay – This will display the same pay range as listed under Guidelines.

Amount – This is where the hourly amount should be entered, modified, or left as is, pending on verbal offer.

Currency – This should always be set to “USD.”

Frequency – For biweekly employees, this should always be set to “Hourly.”

Additional Details – Clicking this will reveal hidden, optional fields.

Expected End Date – A date can be entered if you expect payment will terminate. This field will not automatically terminate payment.

Actual End Date – Any date entered here will automatically terminate all payment on that date. It will remove the entire compensation plan from the employee. Do not add an actual end date for salary unless you are absolutely sure the position will end.

Allowance – Do not add an allowance during the Offer stage. Opportunity to add an allowance comes when an employee is hired into the position.

Merit – Do not add or alter a merit plan to any position as merit is handled via a separate process.

NEXT – SUMMARY Review the detail entered for accuracy and select Next

SUBMIT

COMPLETE TO DO – GET APPROVAL FOR PROPOSED OFFER

*Special Instructions – Now is the time to pause and obtain appropriate approvals, if required, by your divisional vice president for the Offer Compensation step prior to submitting to Recruiting Partner for review and approval. If the salary offer is at the minimum for the position’s job profile Employee Services does not need a justification. However, if the salary offer is above the minimum, please use the **New Hire Request Template** to document justification for the salary.*

*Once approvals and justification have been secured and forwarded to Employee Services, please select the **SUBMIT** button to proceed. Employee Services will perform the remaining steps of the process, including generating the Offer Letter to the candidate and subsequent verifications and background checks once offer is accepted.*

