How to create an equity request:

1. Employee must meet the eligible criteria for an equity increase which is listed below on the home page.
2. Select “Create Request” from the “Create Request” menu
3. Select a request type and enter the employee name in the box. As you type, a drop down list will appear; you must select the employee from the list.

Please note that depending on your role, you will only see employees that you are authorized to see in your department or Vice Chancellor area.
4. Select the employee and click the “Continue” button. As the system is loading the employee’s appointment and salary history, you will see a “Please Wait” prompt. Data is being pulled from the Data Warehouse. If you notice that there is an issue with the data, please notify HR of the issue by clicking the “Feedback” link provided on the bottom of each page.
5. Review the employee information. Then select the “Equity Proposal” tab.

6. Enter the proposed salary. If it is a step-based payroll title that is covered by a union, the default is the next step, except for Police Officers. There is information listed on the right side for your reference, which includes the employee’s current salary, last June 30 salary and maximum possible salary.
A. Proposed Annual Salary

There are two types of entry fields for the proposed annual salary, depending on the employee’s representation status. Requests for non-represented employees will have a text box to enter the proposed salary. For represented employees, the default will be the next step. The user will select from a set of available steps and salaries.
B. Payroll Title
For lateral transfer and lateral reclassification requests, the user must select a payroll title. The user is given a list, including only the titles whose salary grades are the same as the employee’s current grade.

C. Department
For lateral transfer requests, the user must select the department into which the employee is to transfer. A list will be displayed including all departments for which the user is authorized to create equity requests.
7. Select at least one reason for the requested increase. If you select “An internal inequity between two or more positions”, you will be asked to add employees for comparison. To do that, enter the employee’s name into the box, select an employee from the drop down list, and then click on the “Add for comparison” button.

Please note that if you select “An internal inequity between two or more positions”, you will only be able to list employees in the department(s) you have access to.

8. Supporting Documentation
The user can attach a supporting document to back up the request. Click on “Browse” and select the file from your computer that you want to upload. Then click “Attached File”. Please note that if the equity request is for a “Retention”, you will be required to attach supporting documentation. Otherwise attaching supporting documentation is optional.
Save Request or Submit for Approval
You can choose “save request” to finish the request later or “submit” for approval. If the Department Authority has set up department users/approvers for equity requests, they will receive an email notifying them that an equity request is pending and waiting for their approval in the order they are listed in the user/approver list. If the Department Authority has not set up department users/approvers and an equity request is submitted, the request will be sent to the VC Office. The VC Authority and VC Delegate are copied on all actions regarding equity requests in their VC area.

If necessary, an additional user/approver can be added by a user/approver in the department after an equity request is submitted.
10. You can review your submission afterwards by clicking on the side bar “Open” under “My Requests” to display all open requests that you have submitted.
To add an approver or committee, select the “Additional Info” tab and click “Add Approver or Viewer”, the “Role” and “Name” boxes will appear for your input. Please note that the person that you would like to add as an approver/committee needs to
be an authorized user in the system already. Therefore you should add the user in first by clicking on the “Add an Authorized User” from the “Tools” Menu. This step is only required if the user is not an authorized user in the system.

HR initially sets up VC Authority, the VC Authority sets up Department Authority and the Department Authority sets up department users/approvers.

You can also review all your department (Department User or Department Authority) or VC area (VC Authority User) requests.

If you are authorized at the department level, you will see a list of requests that have been submitted by your department. If you are a VC Authority, you will be taken to the search page.
Request Approval Process
1. The rules:

   #1 - VC delegated authority will approve the following cases:
      • Proposed salary above midpoint
      • MSP-level request
      • Lateral transfer
      • Department has no delegated authority
      • Submitter is Department/VC delegated authority
      • Request is for Department/VC delegated authority

   #2 - Requests for represented employees requires LR and HR Comp Analyst approval.

   #3 - Except for #1 and #2 above, the department delegated authority will approve all other requests.

2. Approval
   Click “Awaiting My Approval” from side bar, and then select a request.

   Review the request that you want to approve, and then click on the “Approval Request” tab. The user can use the “Analysis Tools” on this page to review the employee’s five year salary history, department salary and position title salary in their VC area or department.
The effective date is populated initially by the system after the request is submitted. For the lateral transfer requests, it is filled as “upon transfer” for an Equity Increase. For the lateral reclassification, it is filled as the first of the month following the month in which the request was submitted. The user has the option to modify it.

When you make a decision to “Approve/Deny/Return”, you will see a text box for entering comments. Comments are required if a request is being denied or returned. Otherwise comments are optional. The user also has the option to upload a supporting document for backing up the request.

If a request is being returned to the submitter for a revision, the submitter will be able to work on it again. After the request is resubmitted for approval, a new approval process will start over again for all approvers.

The Tools
Users can access the Analysis tools from the side bar or on the approval screen.
Department Salary Analysis

This report provides the user with an overview of the salaries within a department. This information can be helpful in determining whether a proposed action will create a salary inequity within the department. A user may only view those departments for which s/he is authorized to view or submit equity increase requests through the module.

Step/Range column - If the employee’s title is associated with a salary range, it shows where the employee’s annual salary falls within the range. However, if the employee is on a step, the step will be displayed.

Grade/Unit column - for non-represented and non-computer professional employees, this indicates each employee’s salary grade as entered into PPS. For computer professionals, the grade displayed (IT1, IT2, IT3) indicates a level that corresponds to the levels within the computer professional title codes. For represented employees, their unit code (CX, RX, etc.) is displayed.

Click on the “View Report” button if the data does not appear or after you have changed the report parameters. The appointment type is “Regular Career and Partial Year Career” by default.

If the user is a VC authorized user, the user will see an optional box to enter the department code.
Enter a title or multiple title codes by separating with a comma. Then click “View Report” to view the data.
This report provides the user with an overview of the salaries in your VC area for given titles. Because this report contains data from the user’s VC area, an effort has been made to provide useful information while maintaining some anonymity for the employees outside a user’s associated department. The employee’s name is not displayed in this report. The title code salary range is also displayed in the report (only the first title if multiple title codes are entered).

Average salary information for all VC areas on the given title is displayed on the last page of the report.

To download the report, click on the “Disk” icon and select a file format.
Salary History

The Salary History report provides the user with a salary history for a career employee, with notes indicating the reasons for each salary change, where available. The history covers the employee’s most recent hire date if there was a break in service. The “Percent Increase” indicates the growth in the employee’s annual salary since the first action date in the report.