

Instructions for Payroll Personnel – Revised February 12, 2018
2017 Pay Progression for Group A only
Effective PP 01, 2017

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REVIEW PERIOD FOR 2017 PAY PROGRESSION:

The review period for 2017 pay progression is defined as the 26 pay periods prior to the Salary Anniversary Date (SAD). Please note, the review period should include actual service and the SAD should be adjusted by time off payroll as explained in SAD Maintenance (page 2).

The appointing authority may recommend a modified review period for individuals who have been on a leave of absence for a portion of the review period provided that there is at least six months of actual service in 2017 to review during 2017.

WHO IS ELIGIBLE FOR 2017 PAY PROGRESSION:

Per Common Council File #161034 and #170580, eligible titles include both non-Career Ladder and Career Ladder employees (at the maximum of the Career Ladder range) for Group A. See pages 10-11 for additional clarifications.

WHAT IS A SALARY ANNIVERSARY DATE (SAD)?

Initial SAD should have been established and entered in HCM in 2016. 2016 SADs are to be carried forward and adjusted or re-established per the following:

- *A **NON-Career Ladder employee's** salary anniversary date is established after meeting both of the following criteria:*
 - Having passed probation in the current job title if necessary, *and*
 - After completion of 26 pay periods, or a full review period, on payroll in the current job title.
 - Note: Probationary periods do not apply to employees appointed to a position that is exempt from City Service Commission or Fire and Police Commission rules; therefore the salary anniversary date is established after the employee has completed a full review period on payroll in the position.

Example: Employee starts 1/5/2016. They pass probation, complete 26 pay periods on payroll in that title and have no unpaid time. Their Salary Anniversary Date is set as 1/5/2017.

- *A **Career Ladder employee's** salary anniversary date is established after meeting both of the following criteria:*
 - *Having passed probation in the current job title if necessary, and*

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- *After completion of 26 pay periods, or a full review period, after their final career ladder increase.*
- **See Table** on pages 10-11 of this document for additional SAD clarifications.

PAY PROGRESSION IMPORTANT FACTORS:

- **Employees must be employed and on paid status for at least 1 day of the pay period of their SAD to be eligible for 2017 pay progression, including Lump Sum.**
- *Career Ladder employees will always be Lump Sum increases, as they are at the max of their Career Ladder range.*
- *Employees on probation as of their SAD are not eligible for a Lump Sum in 2017.*
- Regularly appointed employees whose SAD falls during a Temporary, Emergency, or Provisional (TEP) appointment, will have their TEP interrupted, primary title restored, pay progression given on their primary title, and then have the TEP restored with an updated rate.

SAD MAINTENANCE:

Payroll Clerks are responsible to:

- Monitoring and Tracking any time off payroll for each employee
 - Run public query in HCM
 - Y_DER_STEPDATE_REVIEW
 - This query provides a picture of job entry and step entry dates that are currently on the top row of job data in HCM.
 - Dates should have been updated during 2016 pay progression.
 - The SAD should be adjusted for each 10 full work days' worth of unpaid time in the employee's regular work schedule; excluding any unpaid partial days (this is different than how we maintain the BSD).
 - **Work days** are defined as full days only – partial days off payroll are not counted.
 - **Unpaid days should be tracked** until 10 full days are accumulated, at which time the SAD should be moved forward 14 calendar days (1 Pay Period).
 - An adjustment should be made to the salary anniversary date for employees who have had unpaid absences from work since their last salary anniversary date.
 - **Unpaid FMLA** is treated the same as any other unpaid absence and should be included when determining an adjusted salary anniversary date.
 - **Unpaid Holiday:** If the period of unpaid time includes a holiday and the employee is not paid for that holiday.
 - **Weekend hours:** If employee is regularly scheduled to work on the weekend day, the unpaid time should be included when determining adjustment to SAD.
 - **Suspensions** should **not** be counted in adjusting the Salary Anniversary Date.
 - **Injured Employees:** Time that injured employees are **off payroll** will be included when determining adjustment to SAD.
 - Include notes under the **General Comments** in HCM to provide an explanation of the reason(s) for any changes in the salary anniversary date.

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- Employees with Salary Anniversary Dates falling from 12/20-12/31 prior to 2016 (Ex. 12/20/2015, 12/30/2006, 12/23/2013, etc) should have their SAD reset to 1/1/17 for Pay Progression purposes. This is a onetime adjustment to these 2016 established SAD's; if the SAD needs to be adjusted at any time starting in 2017 going forward, this rule will not apply.
 - Insert row in Job Data and a General Comment per instructions.
 - Employees whose SAD falls from 12/20-12/31 in 2016 do not need to be reset.

HCM ENTRIES FOR SAD MAINTENANCE:

- Enter the salary anniversary date into the employee's HCM record
 - Navigation
 - Main Menu > Workforce Administration > Job Information > Job Data
 - Salary Plan tab
 - Step Entry Date field
 - Entry
 - Effective Date = First Sunday of the PP in which you are making this entry
 - Action = Data Change
 - Reason = Data Correction–Step Code
 - General Comments
 - Navigation: Main Menu > Workforce Administration > Personal Information > Biographical > General Comments
 - Include notes under General Comments to provide explanation of changes to SAD.
 - **The General Comment must include the dates of unpaid time you are adjusting the SAD by and reason for adjusting it.**

PAY PROGRESSION ASSESSMENTS:

- Notify each employee's supervisor approximately one month prior to the employee reaching the established salary anniversary date that the Employee Assessment (Group A) is to be completed for the review period from their Salary Anniversary Date in 2016 to their Salary Anniversary Date in 2017. The Employee Assessment should be completed on or near their salary anniversary date.
- Monitor for completion of each Employee Assessment no later than the end of the pay period following the pay period in which the salary anniversary date falls.
 - If supervisor does not comply, contact your HR manager, department head or designee, as per your department's protocol.
 - Supervisors who do not complete Employee Assessments for their employees will not be eligible to receive Pay Progression.
- Upon receipt of the completed Employee Assessment :
 - Group A employees:
 - Employees have to "Meet Job Requirements" on all of the factors on the Employee Assessment in order to receive a salary adjustment that is **2% of the employee's biweekly base rate of pay.**
 - Employees who receive a Needs Improvement (NI) rating on any of the factors on the Employee Assessment **will not** receive a salary adjustment in 2017.

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- Verify Employee eligibility for 2017 pay progression.
 - Employees that received Discipline or a PIP during the review period must receive an assessment but are not eligible for 2017 Pay Progression.
 - For Pay Progression administration purposes, “discipline” is defined as having received a suspension or being on a PIP during the review period (See table below).
 - For suspensions, the date of the suspension notice will be considered the effective date of the suspension for Pay Progression administration purposes.
 - *Note: If the disciplinary action is overturned as a result of a disciplinary grievance process, the employee may be eligible provided that he or she is otherwise qualified.*
 - *Note: If the disciplinary action is held in abeyance, the employee is eligible for Pay Progression.*

Type of Discipline	Pay Progression Group	Eligible for Pay Progression?	New SAD Established?
Written Warning	Group A	YES	NO
Suspension	Group A	NO	NO
PIP - Performance Improvement Plan	Group A	NO	NO

- Once Employee Assessment is received and eligibility verified:
 - Complete Notice of Salary Adjustment (NOSA). Keep signed **original** and e-mail the signed NOSA to DER Pay Services.
 - You may e-mail it to: derpayservices@milwaukee.gov
 - Subject line: Group A, NOSA, Dept Name, PP#/Year, Submission #
 - Enter any applicable pay progression entries in HCM and prepare payroll adjustments for any retroactive pay or lump sums, if applicable.

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TEMPORARY, EMERGENCY, OR PROVISIONAL (TEP) APPOINTMENTS:

- Regular employees serving TEP appointments retain the Salary Anniversary Date based on their Regular Certified title.
- If the employee is on a TEP at the time they are due pay progression, their TEP should be interrupted to give them pay progression on their primary job (certified title) if they are due a biweekly or hourly increase.
- *Note: If the employee is due a Lump Sum and they are on a TEP when their SAD arrives, the lump sum amount should be calculated using the certified title's rate of pay and the payment period would be for the full review period.*
- HCM Process in Job Data:
 1. Interrupt the TEP by restoring the primary job title:
 - Effective Date = 1st Sunday of PP SAD falls in
 - Action = Position Change
 - Reason = Restore Title
 - Restore the following primary job info (certified title) including job code, job entry date, union code, bargaining unit, grade date, step date, and comp rate.
 - Change the Empl Class to Regular
 - Save the entry
 2. Insert the biweekly Pay Progression Increase
 - Effective Date = 1st Sunday of PP SAD falls in, one sequence row higher
 - Action = Pay Rate Change
 - Reason = Annual Merit Increase/Decrease
 - Compensation Tab – Update Comp Rate with new rate of pay
 - Save the entry
 3. Continue the TEP – these are new action/reasons to show we are continuing the TEP appointment, not giving a new one.
 - Effective Date = 1st Sunday of PP SAD falls in, one sequence row higher
 - Action = Continue
 - Reason = Choose based on TEP
 - Continue Emergency Appt
 - Continue Provisional Appt
 - Continue Temporary Appt
 - Restore the following TEP job info including position ID, position entry date, job code, job entry date, union code, bargaining unit, grade date, step date, and update the TEP comp rate based on the primary job rate of pay (review Salary Ordinance for rules).
 - Change the Empl Class to Temporary, Emergency, or Provisional
 - Save the entry

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CALCULATING RATES FOR SALARY ADJUSTMENTS AND LUMP-SUM PAYMENTS

The amount of salary adjustment for each employee is to be calculated by the payroll clerk, using the formulas on Page 7.

- Pay Progression for eligible employees will be applied in the form of a base-building, pensionable Biweekly Increase, a non-base building, non-pensionable Lump Sum, or a combination of the two.
- **Pay Progression calculations should be completed based on the base compensation rate of the employee's Certified titles (Regular Appointment); excluding Emergency, Provisional, and Temporary appointments.**
- Payroll clerks should verify with DER if they find discrepancies. **When in doubt, ask.**

See highlighted **Comp Rate** field below for where you will find the biweekly base rate of pay. The Rate Code field should say COMBIW or COMHR.

The screenshot displays the 'Compensation' section of a payroll system. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below these, the employee's 'Empl ID' and 'Empl Record' (0) are shown. The 'Compensation' section includes fields for 'Effective Date' (11/20/2016), 'Effective Sequence' (0), 'HR Status' (Active), and 'Payroll Status' (Active). The 'Action' is 'Earnings Distribution Change' and the 'Reason' is 'CHANGE TO EXCEPTION HOURLY PAY'. The 'Job Indicator' is 'Primary Job'. The 'Compensation Rate' is 3,216.615920 and the '*Frequency' is Biweekly. Below this, there are sections for 'Comparative Information', 'Pay Rates', and 'Default Pay Components'. The 'Pay Components' section is expanded, showing a table with columns for '*Rate Code', 'Seq', 'Comp Rate', 'Currency', 'Frequency', and 'Percent'. The first row is highlighted with a red box, showing a rate code of 'COMBIW', sequence '8', and a comp rate of '3,069.290000'. The second row shows a rate code of 'FOTPCT', sequence '0', and a comp rate of '147.325920'. At the bottom, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 COMBIW	8	3,069.290000	USD	B	
2 FOTPCT	0	147.325920	USD	B	4.800

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The formulas for calculating the actual amount of salary adjustments are as follows:

- Biweekly Increase: $\text{Current Rate} \times 1.02 = X,XXX.XXXXXX = \text{rounded to 2 decimal places} = \$X,XXX.XX$
Ex. $1,765.39 \times 1.02 = 1,800.697800 = \$1,800.70$
- Lump Sum Biweekly Amount: $\text{Current Rate} \times .02 = XX.XXXXXX = \text{rounded to 2 decimal places} = \$XX.XX$
Ex. $2,288.38 \times .02 = 45.767600 = \45.77

BIWEEKLY INCREASE

If the new rate after the salary adjustment is calculated results in a rate that falls within the current pay range, enter the new rate in HCM. Increases are effective as of the pay period in which the SAD falls.

Example: Employee's SAD is 7/20/2014 – Eligible for Pay Progression in pp 15, 2017.

Office Assistant II, PG 6EN with a maximum of \$1,381.63

Employee makes \$1,325.00 BW $\times 1.02 = \$1,351.50$ new BW rate eff pp 15, 2017.

$\$1,325.00 \times .02 = \26.50 biweekly increase amount

LUMP SUM

If the employee's biweekly base rate of pay prior to any salary adjustment is at or higher than the PR maximum, do not make any pay adjustment in HCM. Lump sums are to be paid in the pay period containing the SAD or as close to it as possible. The payment will cover pp 1 through the pp **immediately preceding** the pay period in which the employee's SAD falls.

- *Career Ladder employees will always be Lump Sum increases*

Example: Employee's SAD is 7/20/2014 – Eligible for Pay Progression in pp 15, 2017.

Communications Assistant IV makes \$1,713.29 which is the max of PG 6JN

$1,713.29 \times .02 = \$34.27$ lump sum per pp for pp 1-14 2017 assuming employee was paid 40.0 straight time hours per week.

$\$34.27 \times 14 \text{ PP} = \479.78 Lump Sum

PARTIAL BIWEEKLY INCREASE / LUMP SUM COMBINATION

If the employee is not yet at the pay range maximum but the result of the calculated 2% increase is a rate that is higher than the maximum of the pay range, enter the maximum of the pay range as the new rate in HCM. The employee will receive a lump sum payment for the **difference** between the pay range maximum and the amount that would have resulted after a 2% salary adjustment. The partial lump sum payment should be paid in the pay period containing the SAD or as close to it as possible. The lump sum payment will cover pay period #1 through the pay period **immediately preceding** that in which the employee's SAD falls.

Example: Employee's SAD is 7/20/14 – Eligible for Pay Progression in PP 15, 2017.

Library Reference Assistant PG 5DN, max of PG \$1,650.61

EE makes 1,640.20

$1,640.20 \times 1.02 = 1,673.00$ ($1,640.2 \times .02 = \$32.80$ increase). This is over max of PG 5DN

Increase to 1,650.61 (max of PG) for BW increase eff pp#15 2017

Lump sum: $1,673.00 - 1,650.61 = \$22.39$ per pp for pp 1-14 2017 assuming employee was paid 40.0 straight time hours per week.

$\$22.39 \times 14 \text{ PP} = \313.46 Lump Sum.

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HCM ENTRIES

HCM entries are to be made in accordance with the Biweekly payroll processing schedule, no sooner than the 2nd Monday of the Pay Period in which they are to take effect.

- Navigation
 - Main Menu>Workforce Administration>Job Information>Job Data
- Work Location Tab
 - Effective Date: 1st Sunday of pay period that includes the employee's anniversary date
 - Action: Pay Rate Change
 - Reason: Annual Merit Increase/Decrease
- Compensation Tab
 - Enter the Comp Rate
 - Click Calculate Compensation
 - Verify Comp Rate is correct
 - Save

- Upon completion of pay progression entries for each pay period, complete the Notice of Salary Adjustment (NOSA) form, obtain signatures, and send a **copy** to DER – Pay Services Section, City Hall room 706 or email to derpayservices@milwaukee.gov . Retain the **original** for your records.
- Please use the 2017 Group A NOSA form for 2017 Group A pay progression.
- If Pay Progression is entered timely, you shouldn't need to make retro adjustments.

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PAYROLL ADJUSTMENTS

For complete adjustment instructions see the Pay Progression Adjustment Instructions on the Comptroller's Pay Admin page at <http://city.milwaukee.gov/CityLegacySite/Comptroller/PayrollAdministration.htm#.WLhuyk0zWUk> (Look for Adjustment Instructions for 2017.)

- **Citytime Adjustments - Dollars Tab shall be used for retroactive adjustments and lump-sum payments.**
 - Descriptions complete with the phrase "Pay Progression," Lump Sum or Retro, old and new rates of pay, rate of increase, and a Group A descriptor, shall be included.

FULL LUMP SUM AND PARTIAL LUMP SUM PAYMENTS

All such non-base building, non-pensionable full or partial lump sum payments will be paid on the employee's anniversary date retroactive to pay period 1, 2017. **Calculations should be made using the time period from Pay Period 1 through the Pay Period immediately preceding the pay period in which the employee's Salary Anniversary date falls.**

Group A

- Applied to all eligible paid time up to a maximum of 40 straight time hours (do not include Overtime) per calendar week from PP 01, 2017 through the pay period immediately preceding the employee's anniversary date.

RETROACTIVE PENSIONABLE, BASE BUILDING SALARY ADJUSTMENTS

Pensionable and base-building salary adjustments shall be processed within one pay period of receipt of the satisfactory Employee Assessment. These adjustments are retroactive to the pay period in which the employee's Salary Anniversary Date falls.

- Retroactive payments need only be completed for employees whose salary increase is entered late.

Group A

- Applied to all hours actually paid, including overtime, per calendar week from the pay period in which the employee's anniversary date falls through the pay period prior to that in which the HCM entry was made.

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IS MY EMPLOYEE ELIGIBLE FOR PAY PROGRESSION?

ACTION IN THE PAST 26 PAY PERIODS	PROBATION REQUIRED?	NEW SAD ESTABLISHED?	ELIGIBLE FOR PAY PROGRESSION in 2017?
Regular Appointment from Eligible List	YES	YES	Upon completion of new review period.
Appointment from Promotional Exam Eligible List	YES	YES	Upon completion of new review period.
Promotion after Underfill (CSC Rule IV, Section 6)	YES	YES	Upon completion of new review period.
Promotion without Competitive Exam (CSC Rule IV, Section 9)	YES	YES	Upon completion of new review period.
Promotion after Reclassification (CSC Rule II, Section 4)	Only if recommended by DER as part of classification report & as approved by the CSC.	YES	Upon completion of new review period.
Reallocation (position moved to different pay range or has higher footnoted minimum recruitment rate.	NO	NO- retains established SAD.	YES
Market Job Study (Job Reclassification ~ Pay Restructure – JRC)	NO	NO	YES
Voluntary demotion to position previously held & which employee previously passed probation – One year or less	NO	Adjust SAD by time away from title	Upon completion of review period
Voluntary demotion to position previously held & which employee previously passed probation – More than 1 year	NO	YES	Upon completion of new review period.
Demotion to position employee has not previously held, including demotion due to layoff or career change	YES	YES	Upon completion of new review period.
Transfer to lateral position with same job title and within same Dept or Division	At the discretion of the manager based on change in job duties	YES, if new probationary period. NO, if no new probationary period.	If new SAD, upon completion of new review period. If no new SAD, YES.
Transfer to lateral position with new job title or transfer into different Dept or Division	YES	Yes, after new review period	Upon completion of new review period.

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ACTION IN THE PAST 26 PAY PERIODS	PROBATION REQUIRED?	NEW SAD ESTABLISHED?	ELIGIBLE FOR PAY PROGRESSION in 2017?
Title Change with 3% increase	YES	YES	Upon completion of new review period.
Fixed Term Appointment	Continuous		NOT eligible for Pay Progression
Employee in Career Ladder	YES		If at max of Career Ladder, eligible for Lump Sum
Exempt Appointment	Continuous	YES	Upon completion of 26 pp's on payroll in current title
Received Discipline from SAD 2016-SAD 2017	NO	NO	NO
<i>Rehired to City Service (Non Reinstatement)</i>	YES	YES	<i>Upon completion of new review period.</i>
<i>Reinstatement to same position in same Department/Division within one year of separation</i>	NO	<i>Adjust SAD by time away from title</i>	<i>Upon completion of new review period.</i>
<i>Reinstatement to same position in same Department/Division after one year of separation</i>	<i>Follow CSC rules</i>	YES	<i>Upon completion of new review period.</i>
<i>Reinstatement to different position, or department/division within one year of separation</i>	<i>Follow CSC rules</i>	YES	<i>Upon completion of new review period.</i>
<i>Reinstatement to different position, or department/division after one year of separation</i>	YES	YES	<i>Upon completion of new review period.</i>
RACM Employee whose position is eliminated and is subsequently hired by DCD to do same work as performed in RACM.	MAYBE- Pending review by DER	MAYBE- Pending review by DER	MAYBE- pending review by DER
Employee who received a Pension Offset Adjustment	NO	NO	YES
Temporary / Emergency / Provisional (TEP) Appointments of Regularly appointed employees.	On Certified Title	NO – No time adjustment to the SAD during the Temp/Emerg/Prov appt.	YES - If SAD falls during the Temp/Emerg/Prov appointment, the TEP is interrupted, pay progression added to primary title, and TEP restored
Fire Cadet that doesn't complete original recruit class and restarts with the next recruit class	Continuous	YES, start date of next recruit class	NO, must serve new review period*. *Review period/SAD starts over.

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ACTION IN THE PAST 26 PAY PERIODS	PROBATION REQUIRED?	NEW SAD ESTABLISHED?	ELIGIBLE FOR PAY PROGRESSION in 2017?
Police Aide that doesn't complete original recruit class and restarts with the next recruit class	Continuous	YES, start date of next recruit class	NO, must serve new review period*. *Review period/SAD starts over.
Separating Employees (Retirements, Resignations, etc)			Biweekly Increase: Must be employed and paid for at least 1 day in the pay period of their SAD to be eligible for 2017 pay progression.

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QUESTIONS / WHO TO CONTACT

Questions about Pay Progression process or increase amounts should be directed to DER – Pay Services at derpayservices@milwaukee.gov or x8085

Questions to Payroll Administration about retroactive pay adjustments or lump sum payments may be sent via e-mail to ptransmit@milwaukee.gov

Questions about the Annual Employee Assessment, please contact Lindsey O’Connor at loconn@milwaukee.gov or x3394

Questions about the Pay Progression Appeals Process, please contact Lindsey O’Connor at loconn@milwaukee.gov or x3394

DISCLAIMER: *The Department of Employee Relations reserves the right to modify the content of this document at any time. The information provided establishes the guidelines for administration of applicable Salary Ordinance provisions. The DER reserves the right to interpret and apply such provisions as authorized by Common Council File # 151209 and #161034*