Manager Approval for Faculty Recommendations

A merit approver needs to review and approve a submission for merit increase/adjustment/promotion/retention upon submission of a faculty recommendation by a manager in his/her org unit during the annual compensation review process.

Log on to **BUworks Central**: https://ppo.buw.bu.edu

1. Click on the **Merit Approver tab**
2. Click on **Review and Approve**.
Manager Approval for Faculty Recommendations

1. Select the **Compensation Review** drop down and click on **Faculty Review**.

2. To select an Org Unit, click on the org unit name (note that you can expand org units by clicking the arrow next to the unit or highlighting unit and pressing “expand all”). For approver processing, you have 3 options (see arrows in screenshot) to choose from:
   - Approve
   - Reject
   - Plan (see step 4)

If you are ready to approve or reject a planned and submitted (yellow) org unit highlight the org and click **approve** (or reject) and confirm your action on the pop-up warning. Once you confirm your action the org’s status will change from yellow to green (approved) or yellow to red (sets unit back to “in planning”).

3. The status column shows if an org unit is in **planning mode** (red circle●), **needs approval** (yellow triangle▲) or **approved** (green square■).

4. If you wish to see details of a planned unit or re-plan a unit highlight the unit, click **Plan** and follow the directions below in the **PLANNING COMPENSATION** section. Please note it might not be possible to re-plan a unit if it has been approved by a higher level approver.
Manager Approval for Faculty Recommendations

Also note, from the approval screen you can see total spend for your org units. The total funds, distributed & remaining funds in the Merit/Adjustment is displayed all for subunits (if expanded).

**Congratulations! You have successfully approved a faculty recommendation submitted by a manager.**
Manager Approval for Faculty Recommendations

PLANNING COMPENSATION

1. Clicking **Plan** should take you to the **Plan Compensation Data** screen. You can make recommendations for a merit increase in either of two ways: **Worksheet** (shown below) mode or **Individual Planning** mode.

2. To begin re-planning/planning for employees in the Worksheet mode, click on **employee name**. Any employees with non-grayed out boxes could be re-planned. For a planning in worksheet mode follow the directions below.
Manager Approval for Faculty Recommendations

<table>
<thead>
<tr>
<th>Screen Overview</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Guideline</td>
<td>Available funds in Merit/Adjustment categories</td>
</tr>
<tr>
<td>2. Salary History</td>
<td>Employee’s salary history available in SAP</td>
</tr>
<tr>
<td>3. Check</td>
<td>Warning messages related to employee’s planning</td>
</tr>
<tr>
<td>4. Merit %</td>
<td>Merit in %</td>
</tr>
<tr>
<td>5. Merit Amt</td>
<td>Merit in $ amt</td>
</tr>
<tr>
<td>6. Adj %</td>
<td>Adjustment in %</td>
</tr>
<tr>
<td>7. Adj Amt</td>
<td>Adjustment in $ amt</td>
</tr>
<tr>
<td>8. Promo %</td>
<td>Promotion in %</td>
</tr>
<tr>
<td>9. Promo Amt</td>
<td>Promotion in $ amt</td>
</tr>
<tr>
<td>10. Ret %</td>
<td>Retention in %</td>
</tr>
<tr>
<td>11. Ret Amt</td>
<td>Retention in $ amt</td>
</tr>
<tr>
<td>12. Notes</td>
<td>A performance review related comment such as an increase going over the prescribed guideline.</td>
</tr>
</tbody>
</table>
1. To view **Guideline** (Available Funds), click on Guideline

2. To view **Salary History**, click on Salary History available in SAP

3. Enter either a **Merit %** OR a **Merit amount** and press Enter key.

4. Enter either **Adjustment %** OR **Adjustment amount** and press Enter Key.

5. Enter either **Promo %** OR **Promotion amount** and press Enter Key.

6. Enter either **Retention %** OR **Retention Amount** and press Enter Key.

7. If needed, enter a performance review related comment in the **Notes** field. (eg: If the recommended increase is outside the guideline, you can add a comment.)

To plan for the next employee, click on the **next employee’s name**.
Manager Approval for Faculty Recommendations

1. **To re-save** any changes you have made, click on **Save**. Please note, if you are making **updates** to an org unit that was in **submitted status** you just need to click **Save**. If you were making changes to a unit that was in **Planning Status** continue to the next step to **Submit**.

2. To export the worksheet data to Excel, click **Export**. All the data will be exported to a file on your local computer.

1. Click on **Review and Submit** once you have planned for all your employees.

2. If you have no more changes to make, click on **Submit Planning**.

A confirmation message “**The compensation planning has been successfully submitted**” is displayed. Close the window to exit the worksheet.
Manager Approval for Faculty Recommendations

Planning for Employees in INDIVIDUAL PLANNING Mode (as opposed to Worksheet Mode.)

INDIVIDUAL PLANNING

Highlight an employee (or employees) and click on Individual Planning will bring up an individual’s details.
Manager Approval for Faculty Recommendations

1. To view the available funds in the Merit/Adjustment categories click on Guideline.

2. Enter either Merit % OR Merit Amount and press Enter key.

3. Enter either Retention % OR Retention Amount and press Enter key.

4. Enter either Promo % OR Promotion Amount and press Enter key.

5. Enter either Adj % OR Adjustment Amount and press Enter key.

6. Click on Notes to enter a performance review related comment.

7. Click on arrows next to employee name to move between employee records.

1. At any time to return to table format, click on Table Planning.
Manager Approval for Faculty Recommendations

1. To **re-save** any changes you have made, click on **Save**. Please note, if you are making **updates** to an org unit that was in **submitted status** you just need to click **Save**. If you were making changes to a unit that was in **Planning Status** continue to the next set of steps to **Submit**.

2. To export the worksheet data to Excel, click **Export**. All the data will be exported to a file on your local computer.

1. Click on **Review** and **Submit** once you have planned for all your employees.

2. If you have no more changes to make, click on **Submit Planning**.

A confirmation message “**The compensation planning has been successfully submitted**” is displayed. Close the window to exit the worksheet.