

A merit approver needs to review and approve the staff merit increases that a recommending manager submits during the review process. An approver also has the ability to make updates to entries that have been submitted for review. While approving keep in mind that all sub units in a department must be approved in order for the merit process to be completed for your area.

Approving/Rejecting Merit Planning:

BOSTON UNIVERSITY Home Employee Self-Service Manager Self-Service Payroll Coordin Merit Approver Reports • Plan and Submit • • Review and Approve •	ator Organizational Chart Merit Approver	 Log on to BUworks Central <u>https://ppo.buw.bu.edu</u> Select the Merit Approver tab. Click on Review and Approve.
Planning Overview for TOM KIRKMAN Manager 00092726 Compensation Review Staff Review 2017 Expand All Collapse All Plan Display Progress	TOM KIRKMAN (BUWLT198)	 4. Using the Compensation Review drop down select Staff Review. Important Tip: If you are a manager, your direct reporting org units will load on the Planning Overview screen once step #4 is complete. If you are acting on behalf of a manager as a substitute approver, click here (page 4) for instructions on how to proxy yourself to that manager.
Organizational Unit	Planning Manager	
 Office of ECM Administration 	TOM KIRKMAN	
Training Office	GLORIA DELGADO-PRITCHETT	
Operations Office	RICK GRIMES	
Last Refresh 10/18/2017 12:26:09 Refresh		



	Manager	000	092726 F	а т	OM KIRKMAN (BU	IWI T198)		
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	B Organiza	ational Unit		P	Planning Manager			
	T Offic	e of ECM Admi	inistration	Т	OM KIRKMAN			
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Please e-mail hrcomp@bu.edu if you have any process questions.

5. Make sure to select Staff Review 2017 under Compensation Review. If you wish to view any subunits click on the parent org unit and click **Expand All**, or click on the arrow to the left of the unit's name.

6. Through the Planning Overview screen you can view an org's status (status listed on page 3), employee counts, total guideline, distributed spend and remaining spend of each org by Exempt and Non-Exempt employee groups. Located in the upper right corner is the "Display For" pulldown. This changes the way the employee count and spend is displayed on the overview screen:

- **Direct Reports Only** will aggregate on the planning org level showing only the employee count, guideline and spend for the listed planning org.
- All Employees will show the rollup of employee count, guideline and spend from the sub planning orgs to the parent org

Important Tip: The employee count for the named org is counting only the employees that are planned in the listed org. Managers are usually planned in the org above where their actual position resides

7. You have four options when acting on an org unit. To act on a org unit, click on it's name (the unit's row will be selected) and select one of the following options:

- **Plan:** Allows you to see the planning worksheet for the selected org and, if • necessary, re-plan a submitted or planned status org. Please follow these instructions (page 5) if you need to plan/re-plan an org.
- **Display Progress**: Allows you to see the timeline of when an org was planned/approved/and or rejected and who took the action.
- Approve: Allows you to set a planned/submitted org's status to Approved. Only an org in a yellow A Requires Approval triangle can be approved. Once approved, the status will change to a green square Once all org units in your area are green you are done approving at that dept. level.
- Reject: Allows you to set a planned org's status back to "In Planning", status represented by a red circle . If you are rejecting a parent org that was in "Planning" status it is possible you will move "Approved" subunits back to "Requires Approval" status. If you reject an org be sure to reach



			out to the applicable planning manager so they can re-plan and re-submit their org for review. There is no auto-message that a unit was rejected
Example of approving (parent and sul	o units):		Important notes on Approving/Rejecting
In the example below Manager Tom H Office" and approved resulting in the p "Communications Office" being appro yellow Requires Approval status and review.	Kirkman highlighted the org "Open barent org (ops) and also the sub ved at the same time. Note both d both units had elgible staff mem	rations org were in ibers for	The org unit's status is important when approving or rejecting. Possible status are: In Planning: You cannot approve/reject an org in this status. It must first be planned and submitted for review before taking any approval/rejection actions. If needed you can plan the org following these <u>instructions</u> .
Manager 00092726	TOM KIRKMAN (BUWLT198)		A Requires Approval: You can approve or reject an org in this status as long as
Expand All Collapse All Plan Display Progress	s Approve Reject		the planning manager and approve of reject an org in this status as long as attempt to approve/reject your own planning org unit you will receive the following message: "You cannot approve or reject the planning for your own
Organizational Unit Office of ECM Administration	Planning Manager TOM KIRKMAN	Status	organization". An approving manager at a higher level will need to approve/reject
Training Office	GLORIA DELGADO-PRITCHETT		your org.
 Operations Office 	RICK GRIMES	\triangle	
Communications Office Approve Last Refresh 10/19/2017 00:04:25 Refresh	ALEX KIRKMAN Planning Some organizational units below your selection are not yet approved. Click OK if you want to proceed and approve		Approved: Org is in approved status. It is possible for an approving manager to set this status back to In Planning if they reject an approved org. Please keep in mind an approver cannot reject back their own org and, when rejecting, it is possible you will move " Approved " status subunits back to " Requires Approval ".
	them all at once.		Important Note; Approving Multiple Orgs from the Top Down: If you are a high level approver for an entire department it is possible to approve the top level parent org and its sub units at the same
Manager 00092726 Compensation Review Staff Review 2017	TOM KIRKMAN (BUWLT198)		time*. In order to do this you must make sure all sub orgs are in a yellow Requires Approval status when you Approve the parent org.
Expand All Collapse All Plan Display Progress	Approve Reject		(see example to the top left for the approving of the Ops & Com Offices).
Organizational Unit	Planning Manager	Status	*It is possible that an approver might not be able to approve from the top down if every org in the department does not have an eligible staff employee in it. In these
 Office of ECM Administration 	TOM KIRKMAN	X	cases an approver will have to approve subunits first. If you have any approval
Training Office	GLORIA DELGADO-PRITCHETT	X	issues please do not hesitate to contact hrcomp@bu.edu
 Operations Office 	RICK GRIMES		
Communications Office	ALEX KIRKMAN		



Approving Units	s as a Sul	bstitute (Acting on behalf of	another manager)
••••				1. Enter the PERNR of the manager you want to proxy in the Manager
Planning Overview	for TOM KI	RKMAN		Selection box and press Enter.
				If you do not have the PERNR you can search for a manager by name:
Manager 000 Compensation Review Sta	92726	TOM	KIRKMAN (BUWLT198)	2. To find a manager by name, click on the match box icon (as shown by the arrow). If you see the manager's name you can highlight and click OK. Otherwise click the Show Search Criteria button.
Expand All Collapse All	Plan Display	Progress Ap	prove Reject	
Organizational Unit		Plann	ing Manager	3. Click on Show Criteria and enter the manager's name in the Employee Name box and click Start Search . Please note, the search matches both first and last name in one search. If you only have one of the names use the *
Planning Overview for TOM VID	ZMAN			wildcard. For example when searching Rick Grimes use *Grimes* .The
	NMAIN			search is not case sensitive.
Manager 00092726 Compensation Review Staff Review 2017 Expand All Collapse All Plan Display Pro	TOM KIRKMAN (BUV	VLT198)		4. A list of matching employees with that name will be displayed. Click on the manager's name that you want to proxy to select a manager from the results list. Click OK to select the manager.
Results List: 4 results found for Manager		Pers	onal Value List Settings Show Search Cri	5. Follow instructions listed here to approve the manager's reporting orgs
Empl (Appl Name	Demonsol No.	Lines Name	Ore Unit Sheet Taut	(page 2 step 5).
	00092731		Communications Office	
GLORIA DELGADO-PRITCHETT	00092733	ERAMONESTEST	Training Office	
RICK GRIMES	00092739	GRIMES	Operations Office	
TOM KIRKMAN	00092726	BUWLT198	Office of ECM Administrat	
			OK	



Re	·pla	nning an	org unit	that is	s in Sub	omit	ted s	tat	us	
Com	pensat	tion Planning: S	taff Review 2012	7 (Power L	Jser Mode), S	Step 2 (Plan Co	mpen	satic	Planning Screen layout (described below from the top of the screen to bottom):
Pre	vious N	lext 🕨 🛛 Save								
I\$	Select	1 t Employees Plan	2 Compensation Data	Review an	d Submit					1. Note: The Exempt and Non-Exempt employees are shown on separate tabs. You can switch between both groups of employees by clicking either tab.
Mana	Guideline	KIRKMAN (BUWLT198)	855 40 / 2 548 00 /	1971)		Re	maining: 1.60	2.60 (115)	0)	 2. To view funds available for planning the merit increase, click on Guideline. As you plan you will see the amounts listed decrease as you make entries. Note: If you are planning for multiple units, expand the dropdowns for each unit to see its individual guideline (example to the left shows multi units). 3. The Expert button will export a spreadsheet showing all the
	Trai	ning Office	1 365 00 / 2 657 20	(USD)		Re	maining: 1,00	2 20 (US	D)	amployee info displayed in the planning worksheet
	Ope	rations Office	455.00 / 1,346.80 (U	ISD)		Re	maining: 891.	80 (USD)		
	Com	munications Office	800.80 / 1,201.20 (L	ISD) anning Salar	y History	Re	maining: 400.	40 (USD)		4. The Individual Planning button will let you plan on an employee by employee basis.
E	Check	Name	Grade Prior Yr Rating	Curr Yr Rating	Curr Salary / Rate	Merit %	Merit Amt	Adj %	Ad	
8					0.01-99,999,999.00)				5. The Salary History button will load an employee's salary history
							• 1.9100		• 0.	from SAP.
		WRIGHT, SETH	GR24 0000	3	23.5499	1.00	0.2400	0.00	0	
1		DUNPHY, CLAIRE	GR24 0000	3	22.7500	1.00	0.2300	0.00	0	6. The Check column will display any warnings about the employee's
		SOPRANO, CARMELA	GR24 0000	3	22.5000	1.00	0.2300	0.00	0	record/planning. Green indicates employee is OK, yellow will indicate
		MELFI, JENNIFER	GR25 0003	3	24.5000	1.00	0.2500	0.00	C	a non-hard stop warning and red will indicate a hard stop error exists.
		DANTE, SILVIO	GR24 0002	4	21.6700	2.00	0.4400	0.00	0	You can click on the color icon to view the actual status message.
		LA CERVA, ADRIANA	GR26 0000	4	26.0000	2.00	0.5200	0.00	0	
										Please note there is also sorting and filtering capability through the
										header and filter rows which are at the top of the worksheet.



evious	s Next 🕨 Save			Tronere	Ser Modely S			npens	an	To call an employee o ment take the following steps:
s Iger: 1	1 Select Employees Plan TOM KIRKMAN (BUWLT198)	Compe	nsation Data	Review and	J Submit				-	7. Enter/edit a Current Year Rating for employee between 1 & 5, the rating should be based off the employee's performance review. On use 98/99 if the employee has no applicable rating or is too new to rate.
	Sexempt Non-Exempt									8. Enter/edit EITHER a Merit % OR Merit Amt and press enter. Once the sheet updates you will see the guideline decrease and als
✓ Still	aff Merit NonExmpt Office of ECM Administration Training Office Operations Office	855 1,3 455	5.40 / 2,548.00 (U 65.00 / 2,657.20 5.00 / 1,346.80 (U	SD) (USD) SD)		Rei Rei	maining: 1,692 maining: 1,292 maining: 891.8	2.60 (USD) 2.20 (USD) 30 (USD))	employees you are entering the total annual increase, for non- exempts you are entering just the increase to the current hourly rate <u>Click here</u> (page 8) for an example of how to calculate the increase for the worksheet entry.
	I OMMUNICATIONS LITTICA	0.04	1 80 / 1 201 20 /11	SD)		Re	maining: 400.4	40 (USD)		Important Tip: Dap't apter increases in the Adi 0/ or
View	Default Compensation '	Export .	Individual Pl	anning Salar	y History					Amt columns. They are not to be used for 2017.
View 3 Ch	Default Compensation '	Export . Grade	Individual Pi Prior Yr Rating	anning Salar Curr Yr Rating	y History Curr Salary / Rate 0.01-99,999,999.00	Merit %	Merit Amt	Adj %	Ad	Amt columns. They are not to be used for 2017. Entries in these two columns will result in your org being rejected.
/iew	Default Compensation '	Export . Grade	Individual Pl Prior Yr Rating 0000	anning Salar Curr Yr Rating 3	y History Curr Salary / Rate 0.01-99,999,999.00 23,5499	Merit %	Merit Amt 1.9100 0.2400	Adj %	Ad. • 0.	Amt columns. They are not to be used for 2017. Entries in these two columns will result in your org being rejected.
/iew		Export . Grade GR24 GR24	 Individual Pi Prior Yr Rating 0000 0000 	anning Salar Curr Yr Rating 3 3	y History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500	Merit % 1.00	Merit Amt • 1.9100 0.2400 0.2300	Adj %	Adi • 0. 0	 Amt columns. They are not to be used for 2017. Entries in these two columns will result in your org being rejected. 9. If necessary, add/update a comment in the Notes field (e.g. the
View Ch		Export . Grade GR24 GR24 GR24	Individual Pi Prior Yr Rating 0000 0000 0000	anning Salar Curr Yr Rating 3 3 3	y History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000	Merit % 1.00 1.00 1.00	Merit Amt • 1.9100 0.2400 0.2300 0.2300	Adj % 0.00 0.00 0.00	Ad, • 0. 0	 Amt columns. They are not to be used for 2017. Entries in these two columns will result in your org being rejected. 9. If necessary, add/update a comment in the Notes field (e.g. the recommended increase is outside the guideline). These notes do not solve the solve th
View 3 Ch 6	Communications of the Compensation ' Compensation	Export . Grade GR24 GR24 GR24 GR24 GR25	 Individual Pi Prior Yr Rating 0000 0000 0000 0000 0000 0000 0003 	anning Salar Curr Yr Rating 3 3 3 3 3	y History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000 24.5000	Merit % 1.00 1.00 1.00 1.00	Merit Amt • 1.9100 0.2400 0.2300 0.2300 0.2500	Adj % 0.00 0.00 0.00 0.00	Ad. • 0. 0	 9. If necessary, add/update a comment in the Notes field (e.g. the recommended increase is outside the guideline). These notes do n replace the performance review.
View 3 Ch 3 1 1 1 1 1 1 1 1 1 1 1 1 1		Export . Grade GR24 GR24 GR24 GR25 GR24	 Individual PI Prior Yr Rating 0000 0000 0000 0000 0000 0003 0002 	Curr Yr Rating 3 3 3 3 4	y History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000 24.5000 21.6700	Merit % 1.00 1.00 1.00 1.00 2.00	Merit Amt • 1.9100 0.2400 0.2300 0.2300 0.2300 0.2500 0.4400	Adj % 0.00 0.00 0.00 0.00 0.00	Adj • 0. 0 0 0	 9. If necessary, add/update a comment in the Notes field (e.g. the recommended increase is outside the guideline). These notes do n replace the performance review.
View 3 Ch 1 1 1 1 1 1 1 1 1 1 1 1 1		Export . Grade GR24 GR24 GR24 GR25 GR24 GR25 GR24 GR26	 Individual Pi Prior Yr Rating 0000 0000 0000 0000 0000 0003 0002 0000 	Curr Yr Rating 3 3 3 3 4 4	y History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000 24.5000 21.6700 26.0000	Merit % 1.00 1.00 1.00 2.00 2.00	Merit Amt. • 1.9100 0.2400 0.2300 0.2300 0.2500 0.4400 0.5200	Adj % 0.00 0.00 0.00 0.00 0.00 0.00	Adj • 0. 0 0 0 0	 9. If necessary, add/update a comment in the Notes field (e.g. the recommended increase is outside the guideline). These notes do n replace the performance review. 10. Check for any error messages under the Check column, if none



-	rious N Select	lext Employees Plan	2 Comper	nsation Data	3 Review and	Jubmit				
anag	er: TOM	KIRKMAN (BUWLT198)								
	🔥 Exe	mpt Non-Exempt								
	Guideline	1								
	Staff M	erit NonExmpt								
	Offi	ce of ECM Administration	855	5.40 / 2,548.00 (U	ISD)		Re	maining: 1,69	2.60 (USD))
	Trai	ning Office	1,3	65.00 / 2,657.20	(USD)		Re	maining: 1,29	2.20 (USD))
	Ope	rations Office	455	5.00 / 1,346.80 (U	ISD)		Re	maining: 891.	80 (USD)	
	Com	munications Office	800	0.80 / 1,201.20 (U	ISD)		Re	maining: 400.	40 (USD)	
	iew: Det			L to division D	anning Salan					
V		ault Compensation	Export .		anning Salary	y History				
V R	Check	Name	Grade	Prior Yr Rating	Curr Yr Rating	/ History Curr Salary / Rate	Merit %	Merit Amt	Adj %	Adj Am
V B	Check	Name	Grade	Prior Yr Rating	Curr Yr Rating	/ History Curr Salary / Rate 0.01-99,999,999.00	Merit %	Merit Amt	Adj %	Adj Am
N R N	Check	Name	Grade	Prior Yr Rating	Curr Yr Rating	/ History Curr Salary / Rate 0.01-99,999,999.00	Merit %	Merit Amt . 1.9100	Adj %	Adj Am
V R V	Check	Name WRIGHT, SETH	Grade GR24	Prior Yr Rating	Curr Yr Rating	y History Curr Salary / Rate 0.01-99,999,999.00 23.5499	Merit %	Merit Amt 1.9100 0.2400	Adj %	Adj Am • 0.000
V R	Check	Name WRIGHT, SETH DUNPHY, CLAIRE	Grade GR24 GR24	Prior Yr Rating 0000 0000	Curr Yr Rating 3 3	V History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500	Merit % 1.00	Merit Amt 1.9100 0.2400 0.2300	Adj %	Adj Am • 0.000 0.000 0.000
▲	Check	Name WRIGHT, SETH DUNPHY, CLAIRE SOPRANO, CARMELA	Grade GR24 GR24 GR24	Prior Yr Rating 0000 0000 0000	Curr Yr Rating 3 3 3	/ History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000	Merit % 1.00 1.00	Merit Amt 1.9100 0.2400 0.2300 0.2300	Adj % 0.00 0.00	Adj Am
	Check	Name WRIGHT, SETH DUNPHY, CLAIRE SOPRANO, CARMELA MELFI, JENNIFER	Grade GR24 GR24 GR24 GR24 GR25	Prior Yr Rating 0000 0000 0000 0000 0000 0000	Curr Yr Rating 3 3 3 3 3	History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000 24.5000	Merit % 1.00 1.00 1.00 1.00	Merit Amt 1.9100 0.2400 0.2300 0.2300 0.2500	Adj % 0.00 0.00 0.00 0.00	Adj Am • 0.0000 0.000 0.000 0.000 0.000
	Check	Name WRIGHT, SETH DUNPHY, CLAIRE SOPRANO, CARMELA MELFI, JENNIFER DANTE, SILVIO	Grade GR24 GR24 GR24 GR25 GR25 GR24	Prior Yr Rating 0000 0000 0000 0000 0000 0003 0002	Curr Yr Rating 3 3 3 3 4	History Curr Salary / Rate 0.01-99,999,999.00 23.5499 22.7500 22.5000 24.5000 21.6700	Merit % 1.00 1.00 1.00 1.00 2.00	Merit Amt 1.9100 0.2400 0.2300 0.2300 0.2500 0.4400	Adj % 0.00 0.00 0.00 0.00	Adj Am

Once you have completed planning for **both** exempt and non-exempt employees, press the **Save** button to save changes to the submitted org. Please note, since the org is in submitted status you will not be able to press the **Next** or **Review and Submit** buttons since the org is already submitted for review. After you save the planning you can then approve the org through the approval <u>overview screen</u> (page 2).



How to Enter/Calculate the hourly rate increase for non-exempts

Vi	View: * Default Compensatic 💌 Export 🖌 Individual Planning Salary History												
₽	Check	Name 🚊	Curr Yr Rating	Assign Duration	Scheduled Hrs	Merit %	Merit Amt	Curr Salary / Rate	New Sala				
F								0.01-99,999,999.00					
							• 1.4700						
	Δ	DANTE, SILVIO		12 Month - 52 Weeks	35.00	0.00	0.0000	21.6700	21.6700				
		DUNPHY, CLAIRE	3	12 Month - 52 Weeks	35.00	1.00	0.2300	22.7500	22.9800				

In the example, Silvio Dante is to receive a \$2000 merit increase for 2018, his current salary is \$39,439. 2018 total should approximate \$41,439:



Enter only the hourly rate increase of 1.10 into the **Merit Amount** column, and hit enter. The **New Salary/Rate** column will update.

Name	÷	Curr Yr Rating	Merit %	Merit Amt	Curr Salary / Rate	New Salar	y / Rat
					0.01-99,999,999.00		
				• 2.5700			
DANTE, SILVIO		3	5.08	1.1000	21.6700	22.7700	

You can check what the new annual salary is by multiplying the new rate by hours and assignment duration:

\$22.77 * 35 hours = \$796.95 * 52 weeks = \$41,441.40* a year for 2018.

*System rounding will cause a slight difference between the approximation of \$41,139 & actual update of \$41,441.40.

If you already know the new hourly rate for a non-exempt employee, you just need to enter the difference between the 2017 and 2018 rate in the **Merit Amt** column. OR if you already know the % increase for 2018 just enter the number of the % increase into the **Merit %** column.

If you only know the new annualized increase for a non-exempt employee you will want do the following to find the amount that needs to be entered onto the **Planning Worksheet** in the **Merit Amt** column.

You will need:

Annualized 2018 merit increase Current Scheduled Hours (can be found on worksheet, see left) Current Assign Duration (can be found on worksheet, see left)

The calculation is as follows (for an example, see left):

2018 increase ÷ assign dur, weeks = weekly rate

weekly rate ÷ sch hrs = hourly rate increase

If necessary round the hundredth/second decimal up and enter that amount into the **Merit Amt** column on the planning worksheet.

To check that your entry will result in the correct annual salary for 2018 take the updated amount from the **New Salary/Rate** and do the following:

New Salary/Rate * scheduled hrs * assign dur

To return to planning instructions <u>click here</u> (page 6)