Manager Approval for Staff Merit Recommendations

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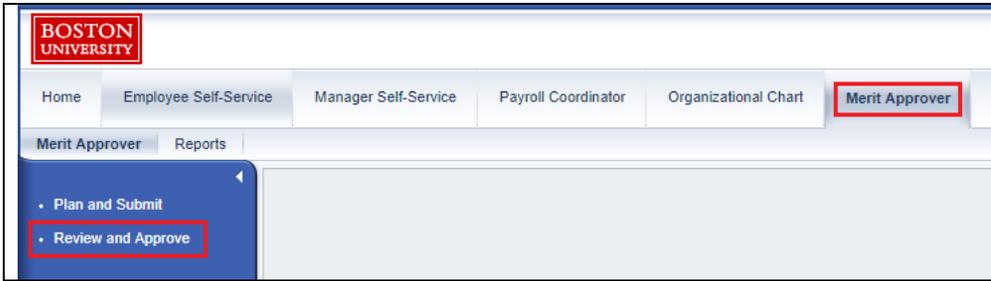
1. Log on to **BUworks Central** https://ppo.buw.bu.edu

2. Select the **Merit Approver** tab.

3. Click on **Review and Approve.**

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.

Planning Overview for TOM KIRKMAN

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 ⚠ **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 sub units):

In the example below Manager Tom Kirkman highlighted the org "Operations Office" and approved resulting in the parent org (ops) and also the sub org "Communications Office" being approved at the same time. Note both were in yellow **Requires Approval** status and both units had elgible staff members for review.

Important notes on Approving/Rejecting

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 instructions.

⚠️ **Requires Approval**: You can approve or reject an org in this status as long as the planning manager and approving manager are not the same person. If you 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 organization"**. An approving manager at a higher level will need to approve/reject your org.

🟩 **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**".
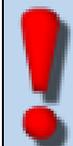
> **Important Note; Approving Multiple Orgs from the Top Down:**
> If you are a high level approver for an entire department it is possible to approve the top level parent org and its sub units at the same time*. In order to do this you must make sure all sub orgs are in a yellow **Requires Approval** status when you **Approve** the parent org. (see example to the top left for the approving of the Ops & Com Offices).
>
> *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 cases an approver will have to approve subunits first. If you have any approval issues please do not hesitate to contact hrcomp@bu.edu

Please e-mail hrcomp@bu.edu if you have any process questions.

Approving Units as a Substitute (Acting on behalf of another manager)

1. Enter the **PERNR** of the manager you want to proxy in the **Manager Selection** box and press **Enter**.

If you do not have the **PERNR** you can search for a manager by name:

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.

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 * wildcard. For example when searching Rick Grimes use *Grimes* .The search is not case sensitive.

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.

5. Follow instructions listed here to approve the manager's reporting orgs (page 2 step 5).

Re-planning an org unit that is in Submitted status

Planning Screen layout (described below from the top of the screen to bottom):

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.

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 **Export** button will export a spreadsheet showing all the employee info displayed in the planning worksheet.

4. The **Individual Planning** button will let you plan on an employee by employee basis.

5. The **Salary History** button will load an employee's salary history from SAP.

6. The **Check** column will display any warnings about the employee's record/planning. Green indicates employee is OK, yellow will indicate a non-hard stop warning and red will indicate a hard stop error exists. You can click on the color icon to view the actual status message.

Please note there is also sorting and filtering capability through the header and filter rows which are at the top of the worksheet.

To edit an employee's merit take the following steps:

7. Enter/edit a **Current Year Rating** for employee between 1 & 5, this rating should be based off the employee's performance review. Only use 98/99 if the employee has no applicable rating or is too new to rate.

8. Enter/edit EITHER a **Merit %** OR **Merit Amt** and press enter. Once the sheet updates you will see the guideline decrease and also the new salary/rate column increase. Please note for exempt employees you are entering the total annual increase, for non-exempts you are entering just the increase to the current hourly rate. Click here (page 8) for an example of how to calculate the increase for the worksheet entry.

> **Important Tip:** Don't enter increases in the Adj % or 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 replace the performance review.

10. Check for any error messages under the **Check** column, if none exist move to the next employee.

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 overview screen (page 2).

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

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
🔻								0.01-99,999,999.00	
							▪ 1.4700		
⚠	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:

Check	Name	≜	Curr Yr Rating	Assign Duration	Scheduled Hrs
⚠	DANTE, SILVIO			12 Month - 52 Weeks	35.00

$2000 ÷ 52 weeks = $38.4615384 week

$38.4615384 ÷ 35 hours = 1.09890; round to 1.10

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 Salary / 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

Please e-mail hrcomp@bu.edu if you have any process questions.