Instructions for Manager Recommendation for Merit Increase for L2324 Employees

A merit recommender needs to complete a **Compensation Planning Worksheet** when there is a need to recommend a merit increase for an eligible employee within 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 Recommender** tab
2. Click on **Plan and Submit**.
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

1. Select the Compensation Review drop down and click on L2324 Review.

2. Select the Employee Selection drop down and click on Eligible Direct Reports.

If you are a recommender planning for multiple manager’s direct reports, click here for selection criteria.
1. Click on Plan Compensation Data. You can make recommendations for a merit increase in either of two ways: Worksheet (shown below) mode or Individual Planning mode.

2. To begin planning for employees in the Worksheet mode, click on employee name.
### Instructions for Manager Recommendation for Merit Increase for L2324 Employees

**Screen Overview**

<table>
<thead>
<tr>
<th>Screen Overview</th>
<th>Description</th>
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<tr>
<td>1. <strong>Guideline</strong></td>
<td>Available funds in Merit/Adjustment categories</td>
</tr>
<tr>
<td>2. <strong>Salary History</strong></td>
<td>Employee’s salary history available in SAP</td>
</tr>
<tr>
<td>3. <strong>Check</strong></td>
<td>Warning messages related to employee’s planning</td>
</tr>
<tr>
<td>4. <strong>Current Score</strong></td>
<td>Current Score (0-30 for L2324)</td>
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<tr>
<td>5. <strong>Merit %</strong></td>
<td>Merit in %</td>
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<tr>
<td>6. <strong>Merit Amt</strong></td>
<td>Merit in Amount</td>
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<tr>
<td>7. <strong>Notes</strong></td>
<td>A performance review related comment such as an increase going over the prescribed guideline</td>
</tr>
</tbody>
</table>
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

1. To view Guideline (Available Funds), click on Guideline.

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

3. Click on the Check column to view any planning warning messages.

4. Enter Current Year score 0 – 30 (for L2324)

5. General Wage Increase is determined by the system

6. Enter either a Merit % or Merit Amount and press Enter. The New Salary/Rate and Guideline fields are updated upon changing either the % or Amt.

7. If needed, enter a performance review related comment in the Notes field, (e.g.; 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.
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

1. To **save** your work while planning (*highly recommended*), click on **Save**.

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

If you are ready to submit your entries you can proceed to the **submission** step below OR if you have saved you’re entries and need to exit the worksheet you can **exit** by **closing the window** and return to the planning the worksheet at a later time.

**NOTE** that the Years of Service calculation is automatically applied during the end of the process cycle. If the employee is below the Years of Service salary calculation, even after merit and general increase are applied, the system will calculate the difference and bring them up to the appropriate hourly rate.

1. Click on **Review** and **Submit** once you have planned for all your L2324 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.

**Congratulations!** You have successfully submitted merit increases for L2324 employees. After submission, the recommendation will now need to be approved by a merit approver. The sections below this will show a recommender additional ways to select employees.
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

Planning for ALL Employees including employees reporting to your Direct Reports

Employees from Org Units

Note: This section will show a recommender additional ways to select employees.

1. Select the Employee Selection drop down and click on Employees from Organization Units.

2. Click on an Org Unit name (you can select multiple by clicking different units).

3. Click on Show Employees
1. Click on Plan Compensation Data.

2. You can plan in either of two ways: Worksheet mode or Individual Planning mode. To access instructions for Individual Planning, click here.

3. Click on an employee’s name to plan for the employee in worksheet mode.
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Instructions for Manager Recommendation for Merit Increase for L2324 Employees

1. To view Guideline (Available Funds), click on Guideline.

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

3. Click on the Check column to view any planning warning messages

4. Enter Current Year score 0 – 30 (for L2324) 5 or 6. Enter either a Merit % or Merit Amount and press Enter. The New Salary/Rate and Guideline fields are updated upon changing either the % or Amt.

NOTE: General Wage Inc is determined by the system

8. If needed, enter a performance review related comment in the Notes field, (e.g.; 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.
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

1. To save your work while planning (highly recommended), click on Save.

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

If you are ready to submit your entries you can proceed to the submission step below OR if you have saved your entries and need to exit the worksheet you can exit by closing the window and return to the planning the worksheet at a later time.

NOTE that the Years of Service calculation is automatically applied during the end of the process cycle. If the employee is below the Years of Service salary calculation, even after merit and general increase are applied, the system will calculate the difference and bring them up to the appropriate hourly rate.

1. Click on Review and Submit once you have planned for all your L2324 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.

Congratulations! You have successfully submitted merit increase for L2324 employees reporting to managers that are in your Org Unit structure. As the next step, the recommendation will now need to be approved by your supervisor. You may skip the next sections since you have already planned and submitted data for your Org. Unit.
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

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.
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

1. Click on **Guideline** to see available funds.
2. Type in **Current Performance Score** (0-30.)
3. Click on Check to see warning messages.

4/5. Click on Merit % or a Merit Amt. The New Salary/Rate and Guideline fields are updated upon changing either the % or Amt.

**NOTE:** If you enter amt OR % that exceeds the recommended guideline, a warning is displayed. This is not a hard stop and you will still be able to save the recommendation.

6. Click on Notes to enter (if needed) a performance review related comment.

7. Click on arrows next to the employee name to move to previous employee or next employee.

8. To return to table format, click on **Table Planning**.
1. To save your work while planning (highly recommended), click on Save.

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

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