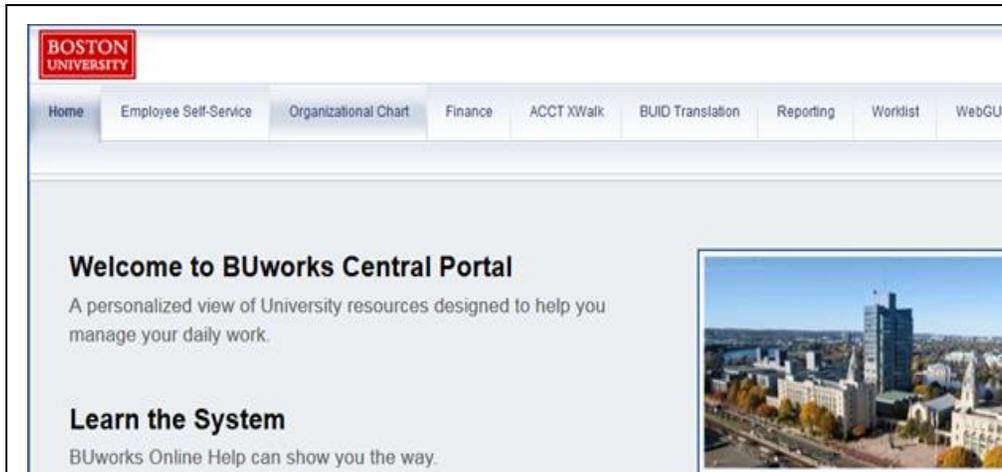


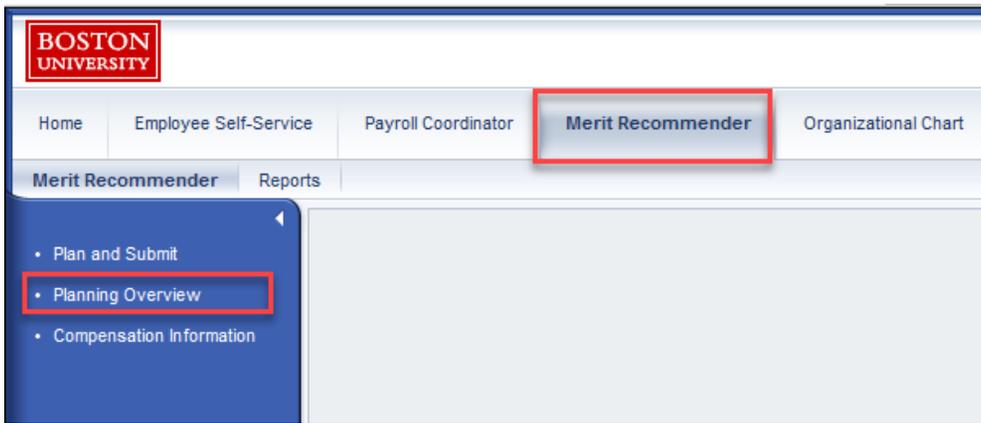


Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention

A merit recommender needs to complete a **Compensation Planning Worksheet** when there is a need to recommend a merit increase/adjustment/promotion/retention for an eligible faculty member in his/her org unit during the annual compensation review process.

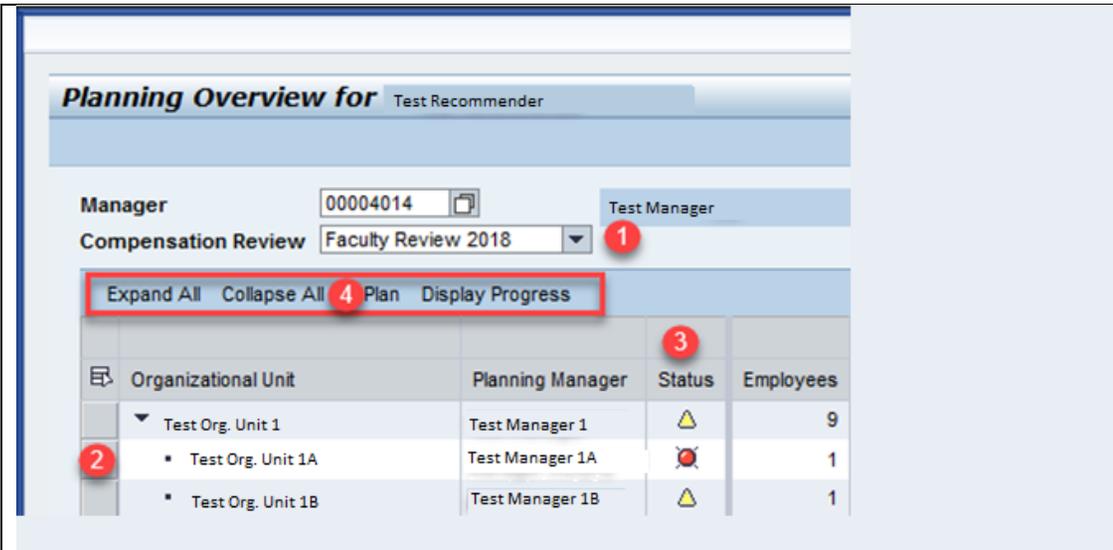


Log on to **BUworks Central**: <https://ppo.buw.bu.edu>



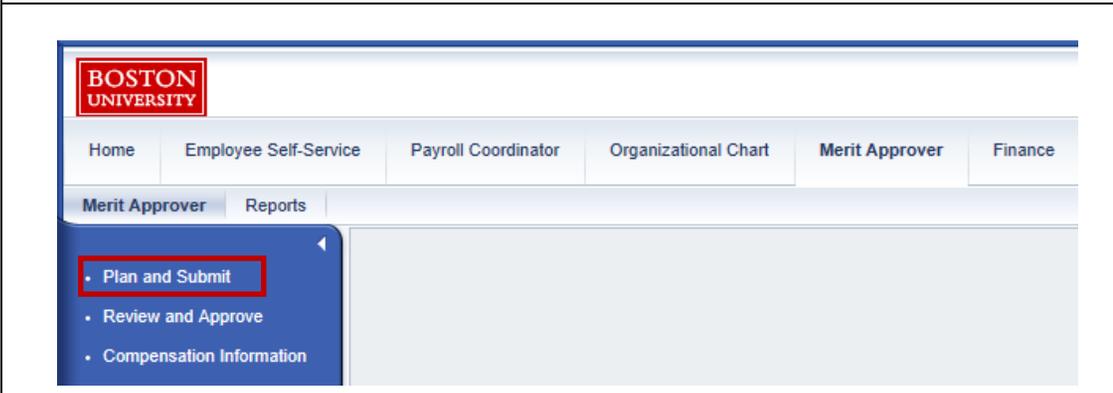
1. Select the **Merit Recommender** tab
2. Click on **Planning Overview**

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



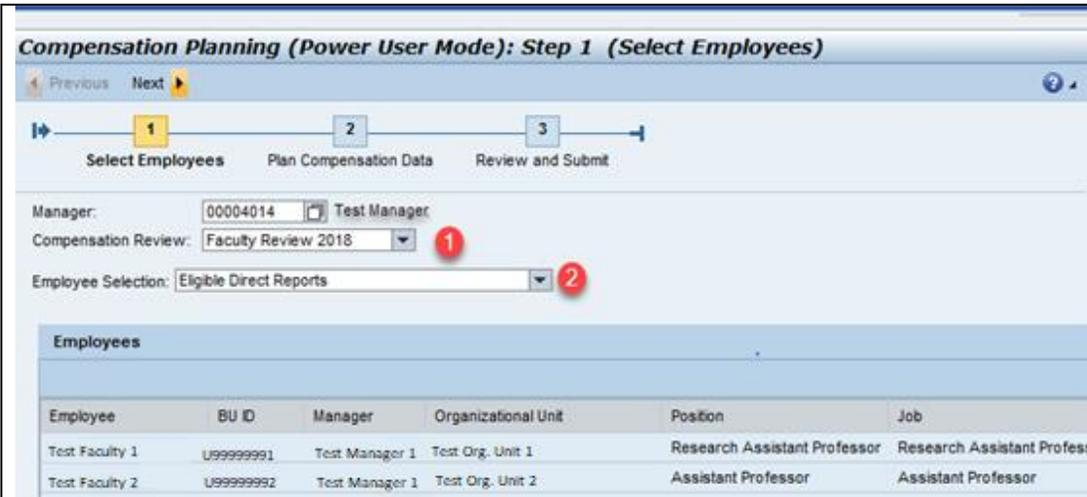
Organizational Unit	Planning Manager	Status	Employees
Test Org. Unit 1	Test Manager 1	△	9
Test Org. Unit 1A	Test Manager 1A	●	1
Test Org. Unit 1B	Test Manager 1B	△	1

1. Select **Faculty Review 2018** from the Compensation Review dropdown
2. To select an Org Unit, click on the **org unit name** (Please note that you can expand org units by clicking the arrow next to the unit or highlighting unit and pressing “Expand All”)
3. The status column shows if an org unit is in planning mode (red circle ●), needs approval (yellow triangle △) or is already approved (green square ■)
4. To plan a recommendation, click on **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



1. To skip the Overview and directly proceed to planning recommendations, click on **Plan and Submit**

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



Compensation Planning (Power User Mode): Step 1 (Select Employees)

Previous Next

1 2 3
Select Employees Plan Compensation Data Review and Submit

Manager: 00004014 Test Manager

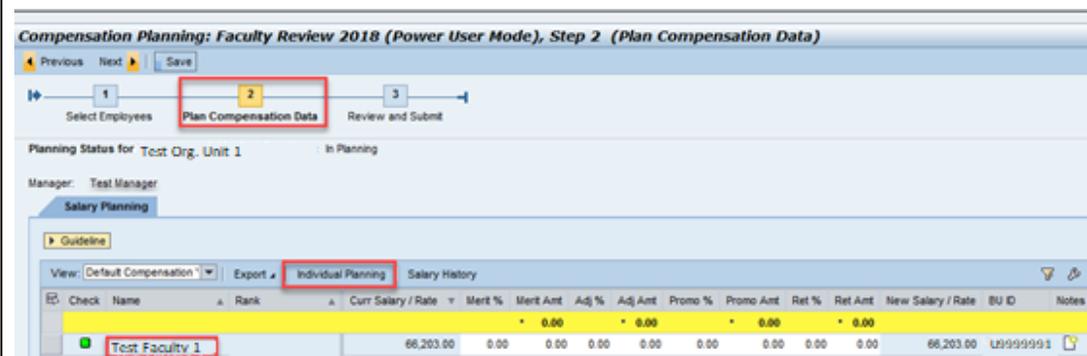
Compensation Review: Faculty Review 2018

Employee Selection: Eligible Direct Reports

Employee	BU ID	Manager	Organizational Unit	Position	Job
Test Faculty 1	U99999991	Test Manager 1	Test Org. Unit 1	Research Assistant Professor	Research Assistant Profess
Test Faculty 2	U99999992	Test Manager 1	Test Org. Unit 2	Assistant Professor	Assistant Professor

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



Compensation Planning: Faculty Review 2018 (Power User Mode), Step 2 (Plan Compensation Data)

Previous Next Save

1 2 3
Select Employees Plan Compensation Data Review and Submit

Planning Status for Test Org. Unit 1 In Planning

Manager: Test Manager

Salary Planning

Guideline

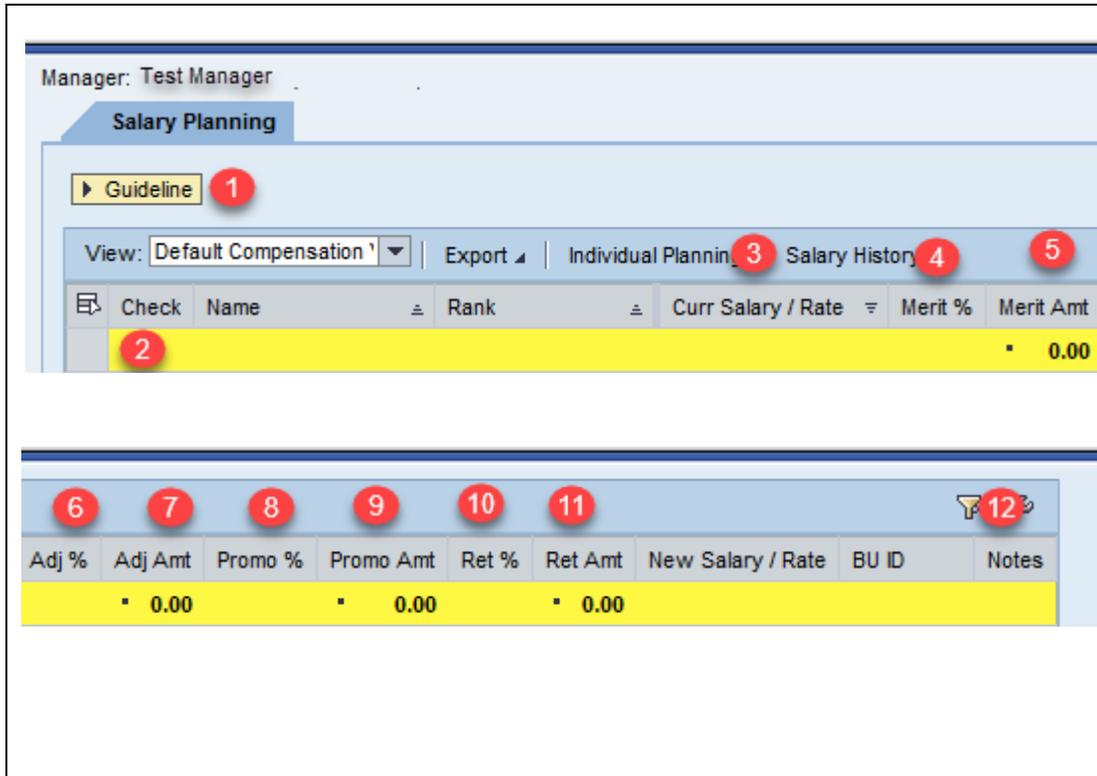
View: Default Compensation Export Individual Planning Salary History

Check	Name	Rank	Curr Salary / Rate	Mert %	Mert Amt	Adj %	Adj Amt	Promo %	Promo Amt	Ret %	Ret Amt	New Salary / Rate	BU ID	Notes
Test Faculty 1			66,203.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	66,203.00	U99999991	

PLANNING COMPENSATION

1. Click on **Plan Compensation Data**
2. You can make recommendations for a merit increase in either of two ways: Worksheet (shown below) mode or [Individual Planning](#) mode
3. To begin planning for employees in the worksheet mode, click on **employee name**

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



The screenshot shows the 'Salary Planning' interface for a 'Test Manager'. It includes a 'Guideline' section (1), a 'View' dropdown set to 'Default Compensation' (2), and navigation tabs for 'Individual Planning' (3), 'Salary History' (4), and 'Merit %' (5). Below these are two data tables. The first table has columns for 'Check', 'Name', 'Rank', 'Curr Salary / Rate', 'Merit %', and 'Merit Amt', with a highlighted row showing '0.00' (6). The second table has columns for 'Adj %', 'Adj Amt', 'Promo %', 'Promo Amt', 'Ret %', 'Ret Amt', 'New Salary / Rate', 'BU ID', and 'Notes', with highlighted rows showing '0.00' for 'Adj Amt' (7), 'Promo Amt' (8), and 'Ret Amt' (9). A filter icon (10) and a search icon (11) are also present. A final callout (12) points to the 'Notes' column.

Screen Overview	Description
1. Guideline	Merit/Adjustment Guideline
2. Check	Warning messages related to employee's planning
3. Salary History	Employee's salary history available in SAP
4. Merit %	Merit in %
5. Merit Amt	Merit in \$ amt
6. Adj %	Adjustment in %
7. Adj Amt	Adjustment in \$ amt
8. Promo %	Promotion in %
9. Promo Amt	Promotion in \$ amt
10. Ret %	Retention in %
11. Ret Amt	Retention in \$ amt
12. Notes	These notes do not replace the Dean's comments and can be used to record any additional information regarding an increase

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention

Salary Planning

Guideline **1**

Faculty Merit

Faculty Adjustment

View: Default Compensation | Export | Individual Planning | Salary History **2**

Check	Name	Rank	Curr Salary / Rate	Merit %	Merit Amt
				3	10,300.00
<input checked="" type="checkbox"/>	Test Faculty 1	Assistant Professor	66,203.00	3.02	2,000.00

Adj %	Adj Amt	Promo %	Promo Amt	Ret %	Ret Amt	New Salary / Rate	BU ID	Notes
4	0.00	5	0.00	6	0.00			7
0.00	0.00	0.00	0.00	0.00	0.00	68,203.00		

1. To view Guideline, click on **Guideline**
2. To view Salary History, click on **Salary History**
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 comment in the **Notes** field. These notes do not replace the Dean's comments.

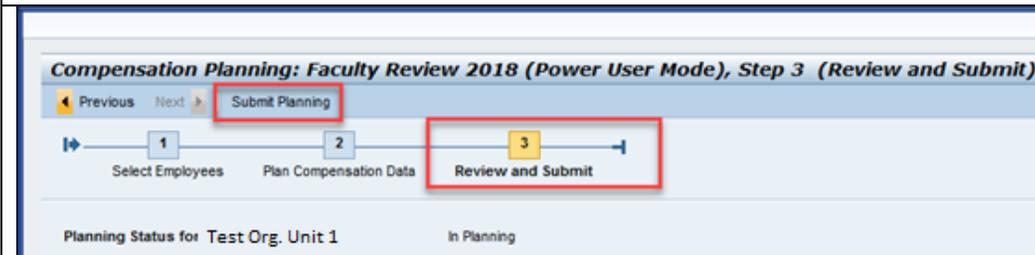
To plan for the next employee, click on the **next employee's name**

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



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

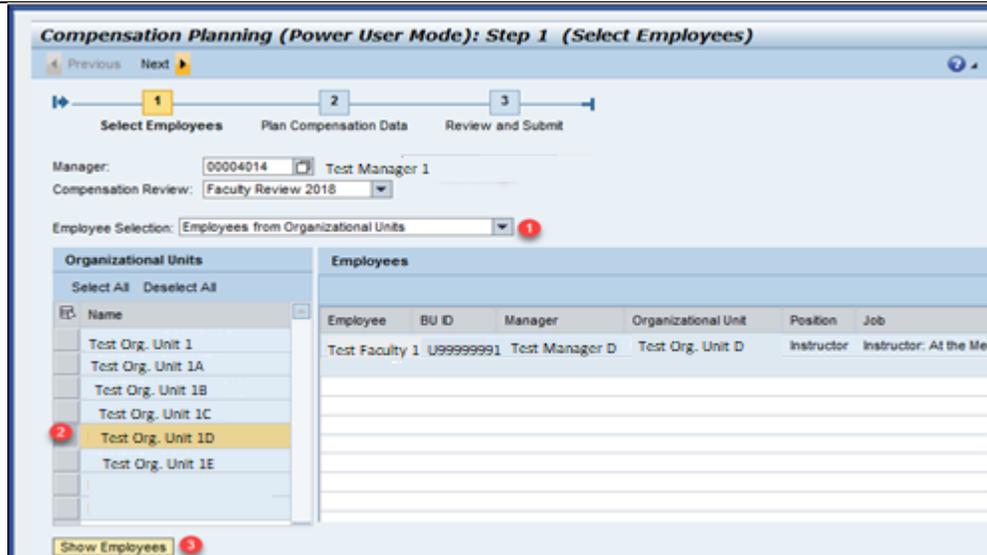


1. Click on **Review and Submit** once you have planned for all your employees
2. If you have no more changes to make, click on **Submit Planning**

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

Congratulations! You have successfully submitted merit increase/ adjustment/ promotion and/or retention amounts for your faculty. As the next step, the recommendation will now need to be approved. *You may skip the next sections since you have already planned and submitted data for your Org. Unit.*

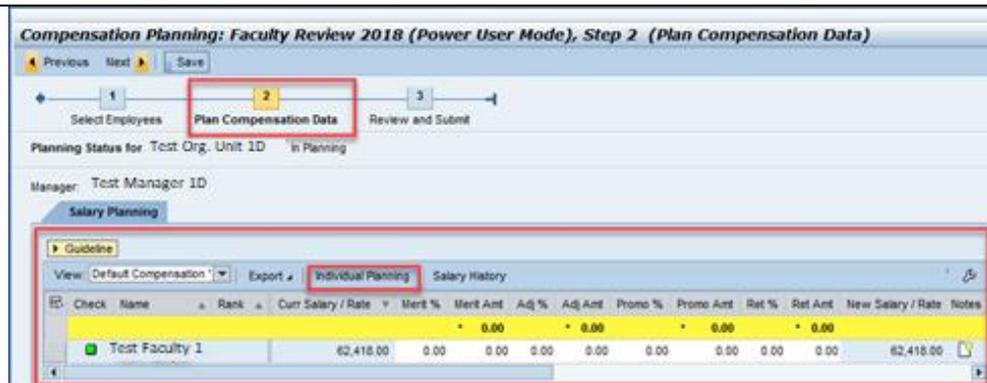
Planning for ALL Employees including employees reporting to your Direct Reports



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

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention

	<table border="1"> <thead> <tr> <th>Screen Overview</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1. Guideline</td> <td>Guideline for 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>These notes do not replace the Dean's notes and may be used to record any additional information regarding an increase</td> </tr> </tbody> </table>	Screen Overview	Description	1. Guideline	Guideline for Merit/Adjustment categories	2. Salary History	Employee's salary history available in SAP	3. Check	Warning messages related to employee's planning	4. Merit %	Merit in %	5. Merit Amt	Merit in \$ amt	6. Adj %	Adjustment in %	7. Adj Amt	Adjustment in \$ amt	8. Promo %	Promotion in %	9. Promo Amt	Promotion in \$ amt	10. Ret %	Retention in %	11. Ret Amt	Retention in \$ amt	12. Notes	These notes do not replace the Dean's notes and may be used to record any additional information regarding an increase
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Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention

Salary Planning

Guideline 1

Faculty Merit

Faculty Adjustment

View: Default Compensation | Export | Individual Planning | Salary History 2

Check	Name	Rank	Curr Salary / Rate	Merit %	Merit Amt
				3	10,300.00
Test Faculty 1	Assistant Professor		66,203.00	3.02	2,000.00

Adj %	Adj Amt	Promo %	Promo Amt	Ret %	Ret Amt	New Salary / Rate	BU ID	Notes
4	0.00	5	0.00	6	0.00			7
0.00	0.00	0.00	0.00	0.00	0.00	68,203.00		

1. To view Guideline, click on **Guideline**
2. To view Salary History available in SAP, click on **Salary History**
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 comment in the **Notes** field. These notes do not replace the Dean's comments.

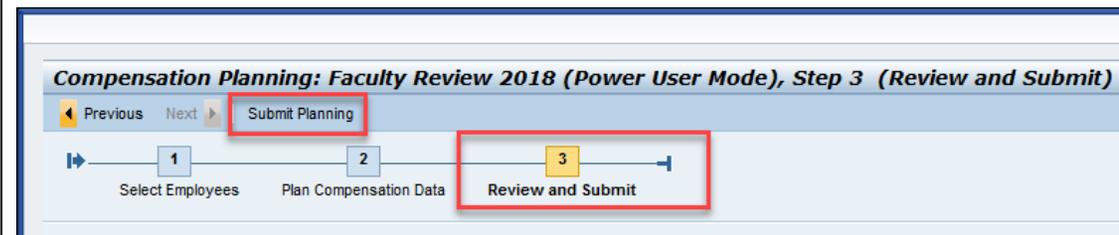
To plan for the next employee, click on the **next employee's name**

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



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



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

Congratulations! You have successfully planned and submitted a **FACULTY** recommendation for the direct reports of the managers in your org. unit. As the next step, the recommendation will now need to be approved. *You may skip the next section.*

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



Salary Planning

Guideline

Faculty Merit
Test Org. Unit 1: 10,300.00 / 10,792.00 (USD) Remaining: 492.00 (USD)

Faculty Adjustment
Test Org. Unit 1: 0.00 / 901.00 (USD) Remaining: 901.00 (USD)

View: Default Compensation | Export | **Individual Planning** | Salary History

INDIVIDUAL PLANNING

Highlight an employee (or employees) and click on **Individual Planning** to bring up an individual's details



Salary Planning

Guideline 1

Faculty Merit
Test Org. Unit 1: 10,300.00 / 10,792.00 (USD) Remaining: 492.00 (USD)

Faculty Adjustment
Test Org. Unit 1: 0.00 / 901.00 (USD) Remaining: 901.00 (USD)

Test Faculty 1 | Table Planning

Name : Test Faculty 1	Manager : Test Manager	Curr Base Rate : 107,100.00
BU ID : U99999991	Rank : Assistant Professor	Date of Hire : 07/01/2016
Cost Ctr : HEM/OHC MED	Date in Rank : 10/20/2016	Check : <input checked="" type="checkbox"/>
Employee Group : Faculty Full-Time	Covered By : Non Tenure Track-NTT	Notes : <input type="text" value="6"/>
% Time : 100.00	Contract End Date : 06/30/2019	
New Salary / Rate : 110,100.00	Assign Duration : 12 Month - 52 Weeks	

Merit Faculty 2	Retention Faculty 3	Promotion Faculty 4	Adjustment Faculty 5
Planning Org Unit: Test Org. Unit 1	Ret %: <input type="text" value="0.00"/> %	Promo %: <input type="text" value="0.00"/> %	Adj %: <input type="text" value="0.00"/> %
Curr Salary / Rate: 107,100.00 USD	Ret Amt: <input type="text" value="0.00"/> USD	Promo Amt: <input type="text" value="0.00"/> USD	Adj Amt: <input type="text" value="0.00"/> USD
Merit %: <input type="text" value="2.00"/> %			
Merit Amt: <input type="text" value="3,000.00"/> USD			

Faculty Review 2017	Faculty Review 2017	Faculty Review 2017	Faculty Review 2017
Effective Date: 07/01/2017	Effective Date: 07/01/2017	Effective Date: 07/01/2017	Effective Date: 07/01/2017
Merit Amt: 2100.00 USD	Ret Amt: 0.00 USD	Promo Amt: 0.00 USD	Adj Amt: 0.00 USD
Merit %: 2.00 %	Ret %: 0.00 %	Promo %: 0.00 %	Adj %: 0.00 %
Frequency: Annually	Frequency: Annually	Frequency: Annually	Frequency: Annually

1. To view the guideline for 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 comment. These notes do not replace the Dean's comments
7. Click on **arrows next to employee name** to move between employee records

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



The screenshot shows the 'Salary Planning' interface. Under the 'Guideline' section, there are two expandable sections: 'Faculty Merit' and 'Faculty Adjustment'. The 'Faculty Merit' section shows 'Test Org. Unit 1' with a value of '10,300.00 / 10,792.00 (USD)' and a remaining amount of '492.00 (USD)'. The 'Faculty Adjustment' section shows 'Test Org. Unit 1' with a value of '0.00 / 901.00 (USD)' and a remaining amount of '901.00 (USD)'. At the bottom, there is a dropdown menu for 'Test Faculty 1' and a button labeled 'Table Planning' which is highlighted with a red box.

1. At any time to return to table format, click on **Table Planning**

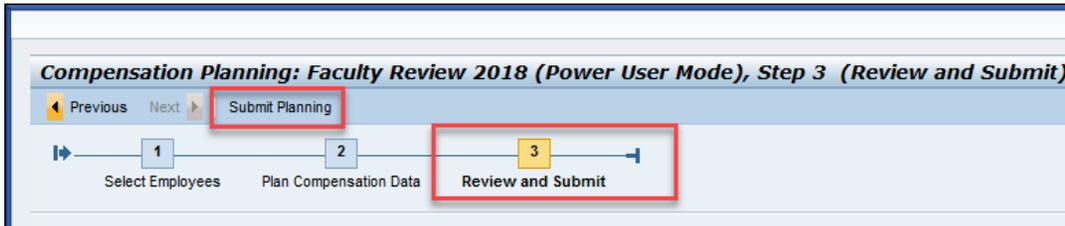


The screenshot shows the 'Compensation Planning: Faculty Review 2018 (Power User Mode)' interface. At the top, there are navigation buttons: 'Previous', 'Next', and 'Save', with 'Save' highlighted in red. Below this is a progress bar with three steps: '1 Select Employees', '2 Plan Compensation Data', and '3 Review and Submit'. The current status is 'Planning Status for Test Org. Unit 1 In Planning'. The manager is identified as 'Test Manager'. Below this is a 'Salary Planning' section with a 'Guideline' dropdown. At the bottom, there is a 'View:' dropdown set to 'Default Compensation', and an 'Export' button highlighted in red. Below the 'Export' button are tabs for 'Individual Planning' and 'Salary History'. At the very bottom, there is a table header with columns: 'Check', 'Name', 'Rank', 'Curr Salary / Rate', and 'Merit %'.

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

Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention



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

Congratulations! You have successfully planned & submitted a recommendation for a merit increase/adjustment/promotion/retention for your FACULTY. As the next step, the recommendation will now need to be approved.