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](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

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

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

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

<table>
<thead>
<tr>
<th>Screen Overview</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>1. Guideline</td>
<td>Merit/Adjustment Guideline</td>
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<tr>
<td>2. Check</td>
<td>Warning messages related to employee’s planning</td>
</tr>
<tr>
<td>3. Salary History</td>
<td>Employee’s salary history available in SAP</td>
</tr>
<tr>
<td>4. Merit %</td>
<td>Merit in %</td>
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<tr>
<td>5. Merit Amt</td>
<td>Merit in $ amt</td>
</tr>
<tr>
<td>6. Adj %</td>
<td>Adjustment in %</td>
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<tr>
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</tr>
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Manager: Test Manager

Screen Overview Description
- Guideline: Merit/Adjustment Guideline
- Check: Warning messages related to employee’s planning
- Salary History: Employee’s salary history available in SAP
- Merit %: Merit in %
- Merit Amt: Merit in $ amount
- Adj %: Adjustment in %
- Adj Amt: Adjustment in $ amount
- Promo %: Promotion in %
- Promo Amt: Promotion in $ amount
- Ret %: Retention in %
- Ret Amt: Retention in $ amount
- Notes: These notes do not replace the Dean’s comments and can be used to record any additional information regarding an increase

Image of Salary Planning screen with annotations for each section.
Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention

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
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Manager: Test Manager 1D

Salary Planning

Guideline

Salary History

Check

Warning messages related to employee’s planning

Merit % Merit in %

Merit Amt Merit in $ amt

Adj % Adjustment in %

Adj Amt Adjustment in $ amt

Promo % Promotion in %

Promo Amt Promotion in $ amt

Ret % Retention in %

Ret Amt Retention in $ amt

Notes These notes do not replace the Dean’s notes and may be used to record any additional information regarding an increase

BU ID

New Salary / Rate

Notes

Manager 1

0.00

0.00

0.00
Manager Recommendation for Faculty Merit Increase/Adjustment/Promotion/Retention

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)

### INDIVIDUAL PLANNING

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

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

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

2. 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.
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.

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.