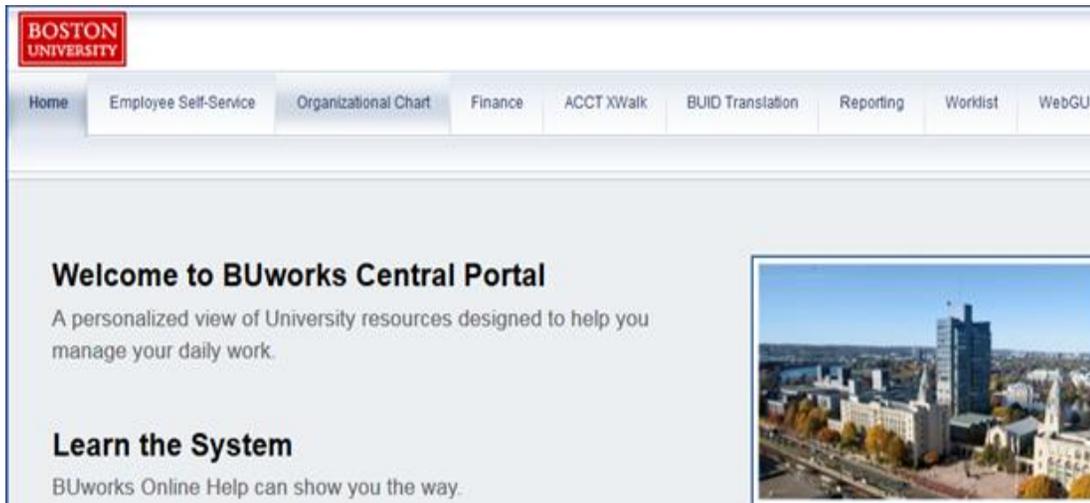




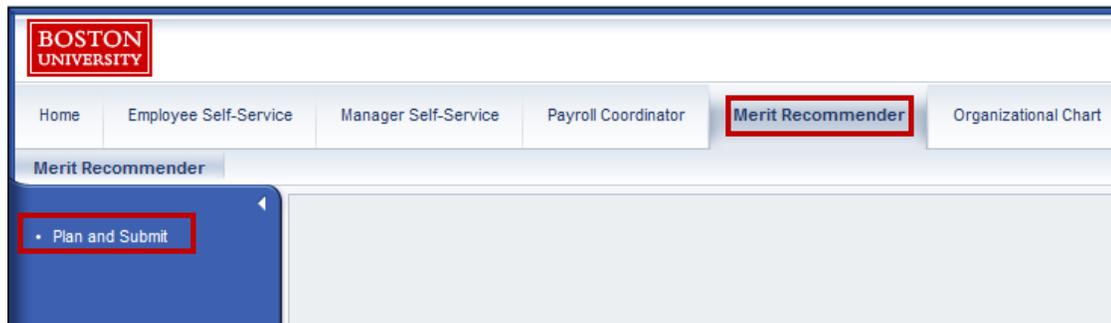
Instructions for Manager Recommendation for Merit Increase for L2324 Employees

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

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

← Previous Next →

1 2 3

Select Employees Plan Compensation Data Review and Submit

Manager: 00092708 GARRETT WALKER (BUWLT195)

Compensation Review: L2324 Review 2017 1

Employee Selection: Eligible Direct Reports 2

Employees

Employee	BU ID	Manager	Organizational Unit	Position	Job
KEN ARNOLD	U41788084	GARRETT WALKER	Academic Department 2	Assistant Coordinator II	20000315
JEREMY BOBB	U55884145	GARRETT WALKER	Academic Department 2	Technician	20000315

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.

Instructions for Manager Recommendation for Merit Increase for L2324 Employees

Compensation Planning: L2324 Review 2017 (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 Academic Department 2: In Planning

Manager: GARRETT WALKER (BUWLT195)

Salary Planning

Guideline

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

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes
• 0.2800										
2	ARNOLD, KEN	GR25	10/06/2011	18	24.5000	0.4900	0.60	0.1500	25.1400	
	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400	

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

Compensation Planning: L2324 Review 2017 (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 Academic Department 2: In Planning

Manager: GARRETT WALKER (BUWLT195)

Salary Planning

Guideline 1

View: Default Compensation Export Individual Planning Salary History 2

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes
3	ARNOLD, KEN	GR25	10/06/2011	4	24.5000	0.4900	5	0.1500	25.1400	7
	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400	

Screen Overview	Description
1. Guideline	Available funds in Merit/Adjustment categories
2. Salary History	Employee's salary history available in SAP
3. Check	Warning messages related to employee's planning
4. Current Score	Current Score (0-30 for L2324)
5. Merit %	Merit in %
6. Merit Amt	Merit in Amount
7. Notes	A performance review related comment such as an increase going over the prescribed guideline

Instructions for Manager Recommendation for Merit Increase for L2324 Employees

Compensation Planning: L2324 Review 2017 (Power User Mode), Step 2 (Plan Compensation Data)

◀ Previous Next ▶ Save

1 Select Employees 2 Plan Compensation Data 3 Review and Submit

Planning Status for Academic Department 2: In Planning

Manager: GARRETT WALKER (BUWLT195)

Salary Planning

Guideline 1

L2324 Merit

Academic Department 2 509.60 / 855.40 (USD) Remaining: 345.80 (USD)

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

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes
3				4		5	6	0.2800		7
<input checked="" type="checkbox"/>	ARNOLD, KEN	GR25	10/06/2011	18	24.5000	0.4900	0.60	0.1500	25.1400	
<input checked="" type="checkbox"/>	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400	

KEN ARNOLD Salary History for Employee

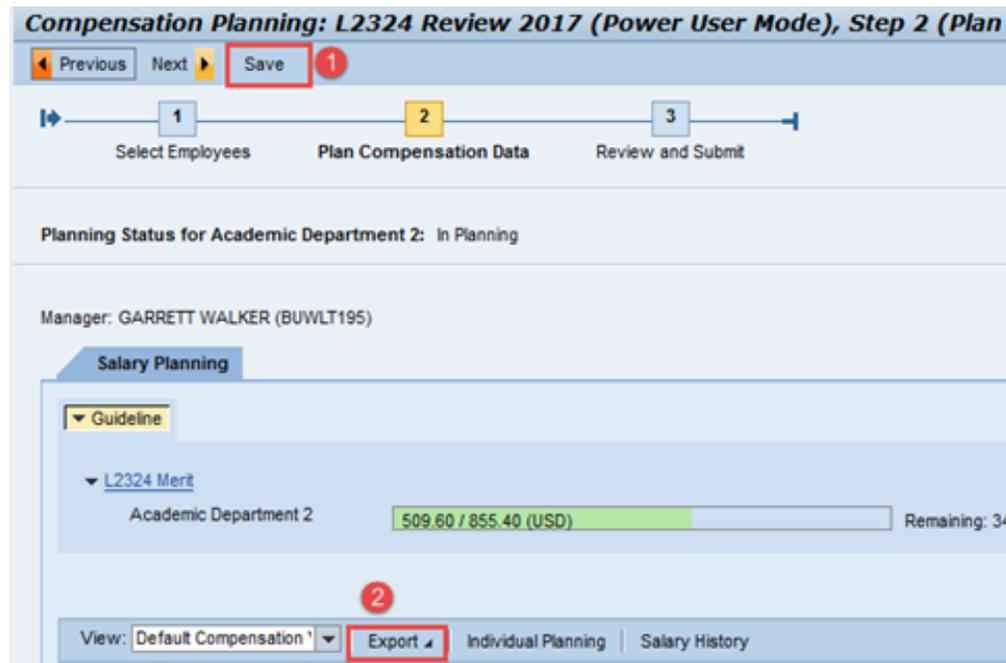
Start Date	End Date	Annual salary	Reason Text
01/01/2016	12/31/9999	44,590.00	New Position

Close

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.

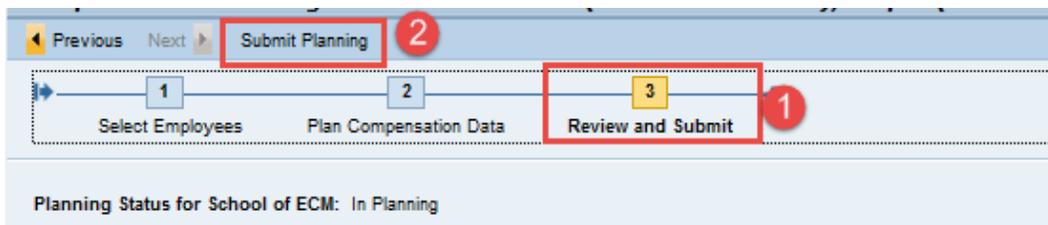
If you are ready to submit your entries you can proceed to the **submission** step below **OR** if you have saved you're entries and need to exit the worksheet you can **exit** by **closing the window** and return to the planning the worksheet at a later time.

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.

Planning for ALL Employees including employees reporting to your Direct Reports

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

Previous Next

1 2 3
 Select Employees Plan Compensation Data Review and Submit

Manager: 00092686 FRANCIS UNDERWOOD (BUWLT200)

Compensation Review: L2324 Review 2017 **1**

Employee Selection: Employees from Organizational Units **2**

Organizational Units		Employees					
Select All	Deselect All	Employee	BU ID	Manager	Organizational Unit	Position	Job
<input type="checkbox"/>	<input type="checkbox"/>	KEN ARNOLD	U41788084	GARRETT WALKER	Academic Department 2	Assistant Coordinator II	20000315
<input type="checkbox"/>	<input type="checkbox"/>	JEREMY BOBB	U55884145	GARRETT WALKER	Academic Department 2	Technician	20000315
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						

Academic Department 2 **3**

Show Employees **4**

Data From: 03/20/2017 13:29:43 Refresh

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**



Instructions for Manager Recommendation for Merit Increase for L2324 Employees

Compensation Planning: L2324 Review 2017 (Power User Mode), Step 2 (Plan Compensation Data)

◀ Previous Next ▶ Save

1 Select Employees **2 Plan Compensation Data** 3 Review and Submit

Planning Status for Academic Department 2: In Planning

Manager: FRANCIS UNDERWOOD (BUWLT200)

Salary Planning

▶ Guideline

View: Default Compensation ▼ Export ▲ Individual Planning Salary History

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes
								0.2800		
✓	ARNOLD, KEN	GR25	10/06/2011	18	24.5000	0.4900	0.60	0.1500	25.1400	
✓	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400	

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.

Compensation Planning: L2324 Review 2017 (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 Academic Department 2: In Planning

Manager: FRANCIS UNDERWOOD (BUWLT200)

Salary Planning

Guideline 1

View: Default Compensation Export Individual Planning Salary History 2

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes
3	ARNOLD, KEN	GR25	10/06/2011	4	24.5000	0.4900	5	6 0.2800	25.1400	7
	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400	

Screen Overview	Description
1. Guideline	Available funds in Merit/Adjustment categories
2. Salary History	Employee's salary history available in SAP
3. Check	Warning messages related to employee's planning
4. Current Score	Current Score (0-30 for L2324)
5. Merit %	Merit in %
6. Merit Amt	Merit in Amount
7. Notes	A comment such as an increase going over the prescribed guideline

Instructions for Manager Recommendation for Merit Increase for L2324 Employees

Compensation Planning: L2324 Review 2017 (Power User Mode), Step 2 (Plan Compensation Data)

Previous Next Save 8

1 2 3
Select Employees Plan Compensation Data Review and Submit

Planning Status for Academic Department 2: In Planning
Manager: FRANCIS UNDERWOOD (BUWLT200)

Salary Planning

Guideline 1

L2324 Merit
Academic Department 2 509,60 / 855,40 (USD) Remaining: 345,60 (USD)

View: Default Compensation Export Individual Planning Salary History 2

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes	BU ID	Planning Org Unit	Manager
3	ARNOLD, KEN	GR25	10/06/2011	18	24,5000	0.4900	0.60	0.1500	25,1400	7	U41788084	Academic Department 2	GARRETT WALKER
	BOBB, JEREMY	GR24	04/07/2014	18	21,6700	0.4400	0.60	0.1300	22,2400		U55884145	Academic Department 2	GARRETT WALKER

JEREMY BOBB Salary History for Employee

Start Date	End Date	Annual salary	Reason Text
01/01/2016	12/31/9999	39,439.00	New Position

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



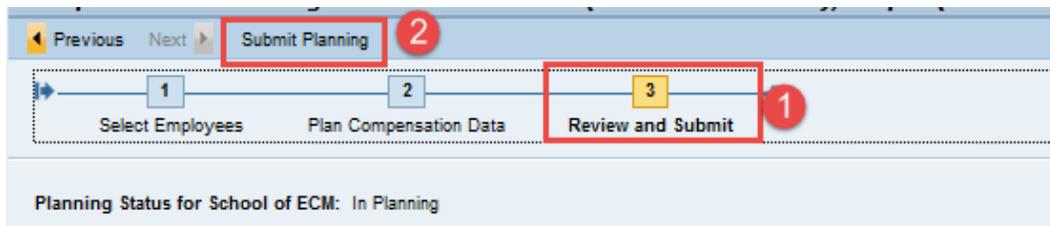
1. To **save** your work while planning (*highly recommended*), click on **Save**.
2. To export the worksheet data to Excel, click **Export**. All the data will be exported to a file on your local computer.

If you are ready to submit your entries you can proceed to the **submission** step below **OR** if you have saved 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 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*.)

Compensation Planning: L2324 Review 2017 (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 Academic Department 2: In Planning

Manager: GARRETT WALKER (BUWLT195)

Salary Planning

▶ Guideline

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

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes	
								0.2800			
<input type="checkbox"/>	ARNOLD, KEN	GR25	10/06/2011	18	24.5000	0.4900	0.60	0.1500	25.1400		
<input type="checkbox"/>	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400		

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

Salary Planning

Guideline 1

L2324 Merit

Academic Department 2 509.60 / 855.40 (USD) Remaining: 345.80 (USD)

7 KEN ARNOLD Table Planning 8

Name	ARNOLD, KEN	Title	Assistant Coordinator II	Assign Duration	12 Month - 52 Weeks
BU ID	U41788084	Grade	GR25	Scheduled Hrs	35.00
Manager	GARRETT WALKER	Check	<input checked="" type="checkbox"/>	Notes	<input type="text"/>
Date of Hire	10/06/2011				

Merit L2324

Planning Org Unit: Academic Department 2

Curr Score: 2

Merit %: % 4

Merit Amt: USD 5

New Salary / Rate: 25.1400

General Increase L2324

Curr Salary / Rate: 24.5000USD4

Gen Wage Inc: 0.4900 USD4

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**.

Instructions for Manager Recommendation for Merit Increase for L2324 Employees

Compensation Planning: L2324 Review 2017 (Power User Mode), Step 2 (Plan Compensation Data)

◀ Previous Next ▶ **Save** ①

1 → 2 → 3 →

Select Employees **Plan Compensation Data** Review and Submit

Planning Status for Academic Department 2: In Planning

Manager: GARRETT WALKER (BUWLT195)

Salary Planning

Guideline

L2324 Merit

Academic Department 2 509.60 / 855.40 (USD) Remaining: 345.80 (USD)

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

Check	Name	Grade	Date of Hire	Curr Score	Curr Salary / Rate	Gen Wage Inc	Merit %	Merit Amt	New Salary / Rate	Notes
								0.2800		
■	ARNOLD, KEN	GR25	10/06/2011	18	24.5000	0.4900	0.60	0.1500	25.1400	
■	BOBB, JEREMY	GR24	04/07/2014	18	21.6700	0.4400	0.60	0.1300	22.2400	

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.

◀ Previous Next ▶ **Submit Planning** ②

1 → 2 → 3 →

Select Employees Plan Compensation Data **Review and Submit** ①

Planning Status for School of ECM: In Planning

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.