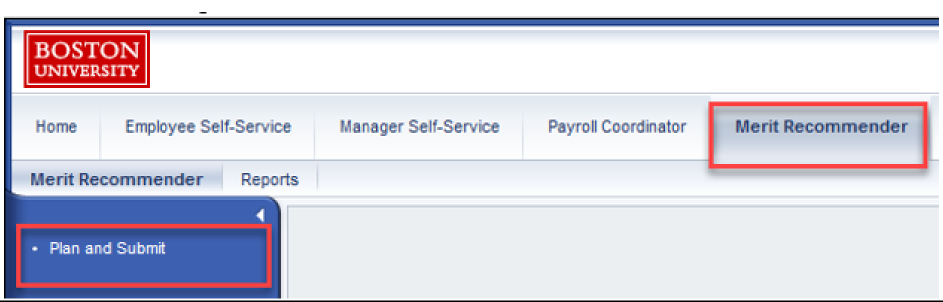
BOSTON UNIVERSITY

# Manager Recommendation for Staff Merit Increase

A merit recommender needs to complete a **Compensation Planning Worksheet** when there is a need for an eligible employee to receive a merit increase.

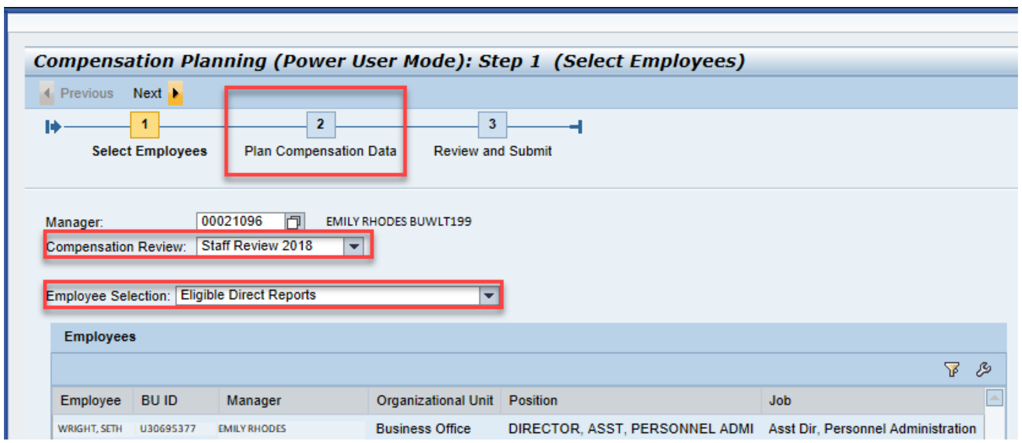
## Planning Merit Increases for Eligible Direct Reports:




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

2. Select the **Merit Recommender** tab

3. Click on **Plan and Submit**



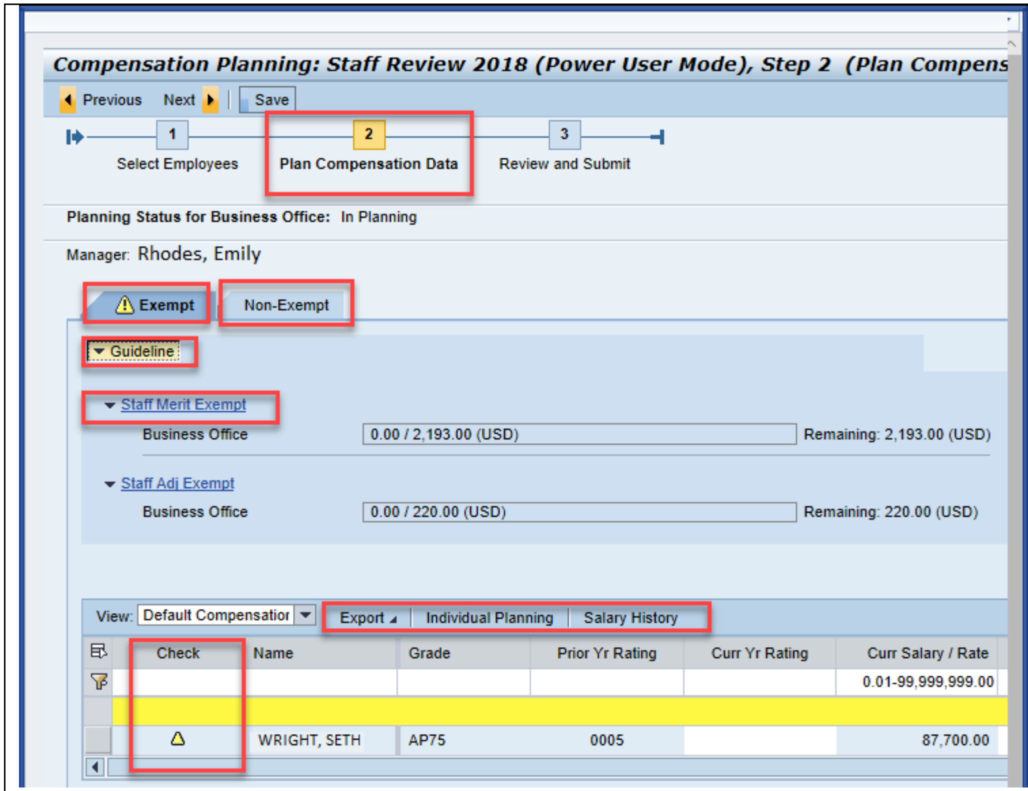

4. Using the **Compensation Review** drop down select **Staff Review 20[XX]** (the year in which the merit cycle begins)**.** In the example to the left, Staff Review 2018 is selected for the merit cycle that began in 2018 with merit increases effective January 1, 2019.

If you are a manager, your direct reports will load once you complete step #4. If you are acting on behalf of a manager as a substitute planner, click here (page 6) for instructions on how to **proxy** yourself to that manager.

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

> **Important Tip**: If you are a user planning for an entire org that includes not only your direct reports but employees in sub units that report to a parent org, click here .

6. Once you have selected the employees for whom you want to plan for click on the #2 box "**Plan Compensation Data**" or click **Next.**




After step #6 you will be taken to the planning worksheet. The layout is described below from the top of the screen to the bottom:

7. **Note:** The **Exempt and Non-Exempt** employees are shown on separate tabs. You can switch between both groups of employees by clicking either tab.

8. 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.

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

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

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

12. The **Check** column will display any warnings about the employee's record/planning. Click on the color icon to view the actual status message. Green indicates employee is OK and that current entries are valid. Yellow will indicate a warning that is not a hard stop. Red will indicate that a hard stop error exists.

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

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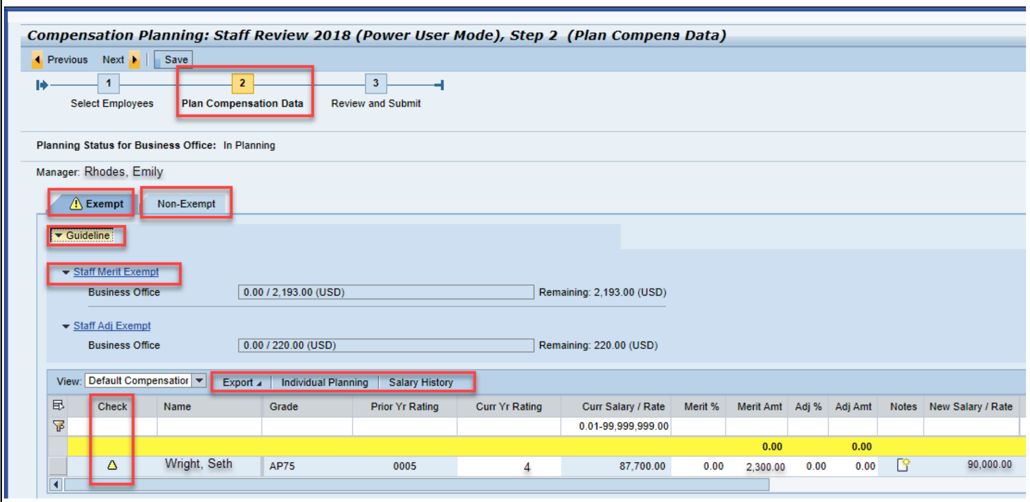
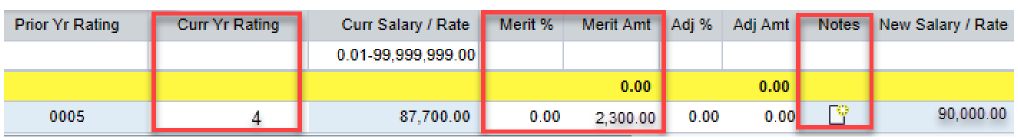



**Important Tip**: You are able to save your progress/entries at any time by clicking the **Save** button at the top of the page. To make it easier to follow an employee's data across the worksheet you can click on their name/line to highlight it.

13. Enter a **Current Year Rating** between 1 & 5, this rating is based on the employee's performance review. Enter 98 if there is no applicable rating for the employee (ex. Employee has terminated). Enter 99 if the employee is too new to rate.

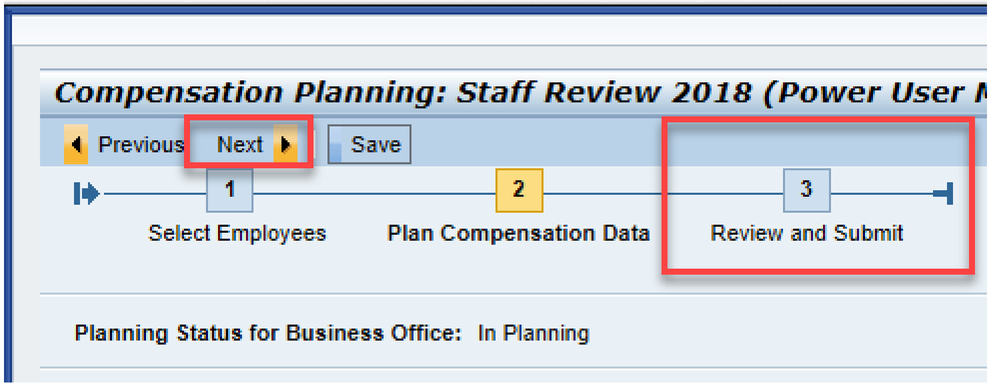
14. Enter EITHER a **Merit %** OR **Merit Amt** and press enter. Once the sheet updates you will see the guideline decrease and also the new salary/rate column will increase. Please note that for **Exempt** employees the total annual increase is entered, for **Non-Exempts** just the increase to the current hourly rate. Click here (page 7) for an example of how to calculate the increase for non-exempt employees.

**Important Tip:** Do not enter increases in the Adj % or Amt columns as they are not to be used for 2018.

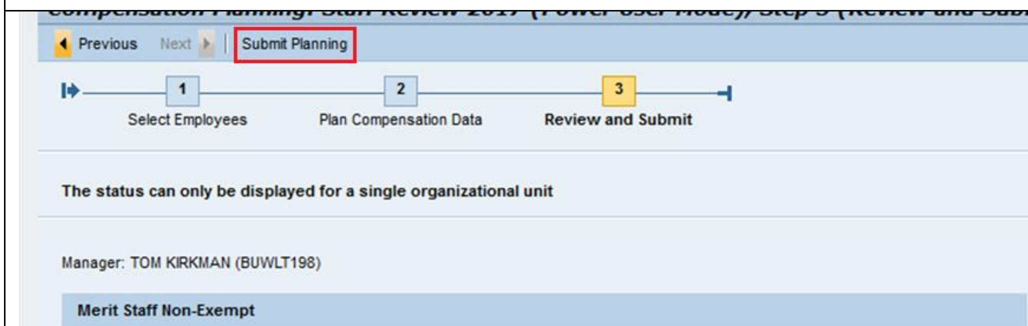
15. If necessary, add a comment in the **Notes** field (e.g. the recommended increase is outside the guideline). These notes do not replace the performance review.

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

**Important Tip:** Only after planning for **BOTH** Exempt & Non-Exempt employees, proceed to next step. Planning for only one tab will result in submission of 0% increases for the non-planned tab.




17. Click on Box #3 **Review and Submit** or **Next.**

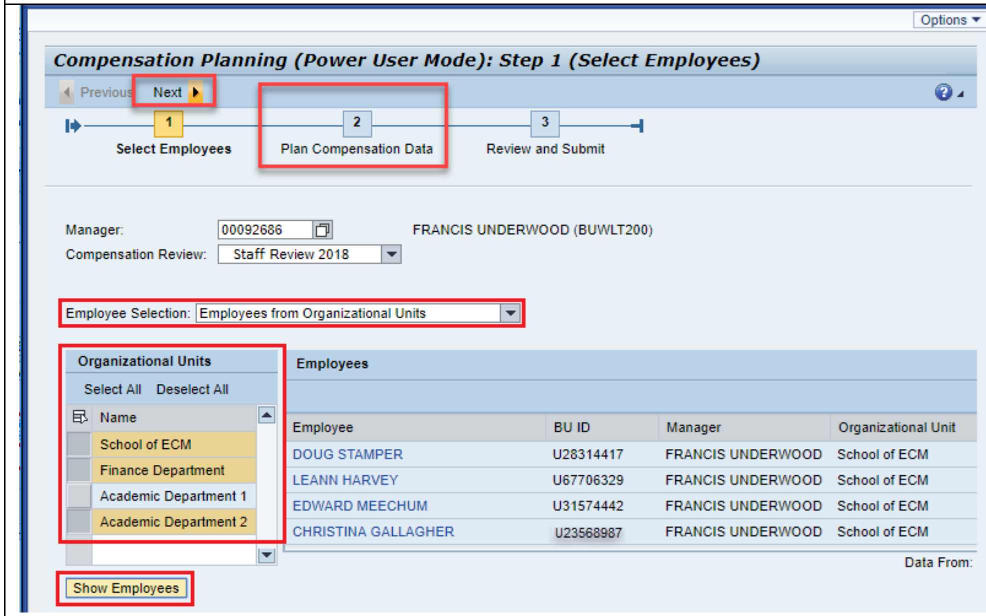



18. Review the submission screen carefully to determine if your entries are correct. If you need to make any corrections press the **Previous** button to return to the planning worksheet. Otherwise if everything looks OK to submit your updates, click on **Submit Planning**.

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 recommendations for your STAFF. As the next step, the recommendation will now need to be approved by your department’s approver.

# Planning for *ALL* employees within an area (how to plan for your direct report's employees)




1. Through the **Employee Selection** drop down select **Employees from Organization Units**

2. Click on an **Org Unit** name

3. Once you have the units selected, click on **Show Employees.** Once your employee list is loaded you can start planning recommendations for the listed employees by clicking on the #2 box "**Plan Compensation Data**" or **Next**. If you need help on how to plan click here to return to the planning instructions, or return page 2.

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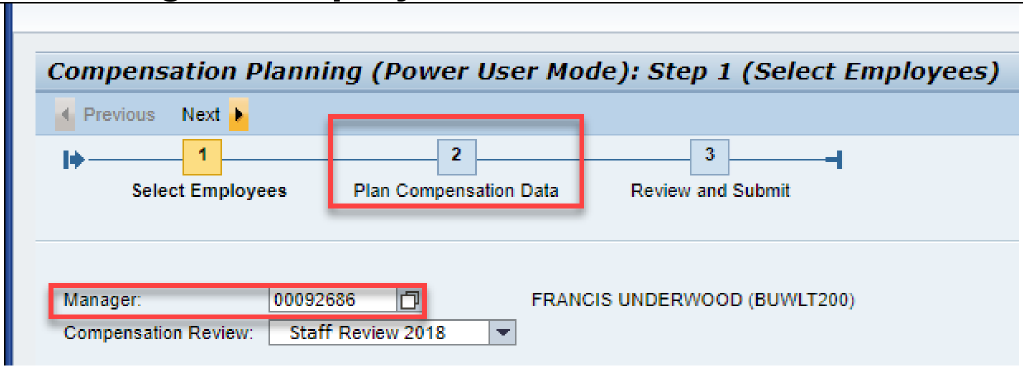
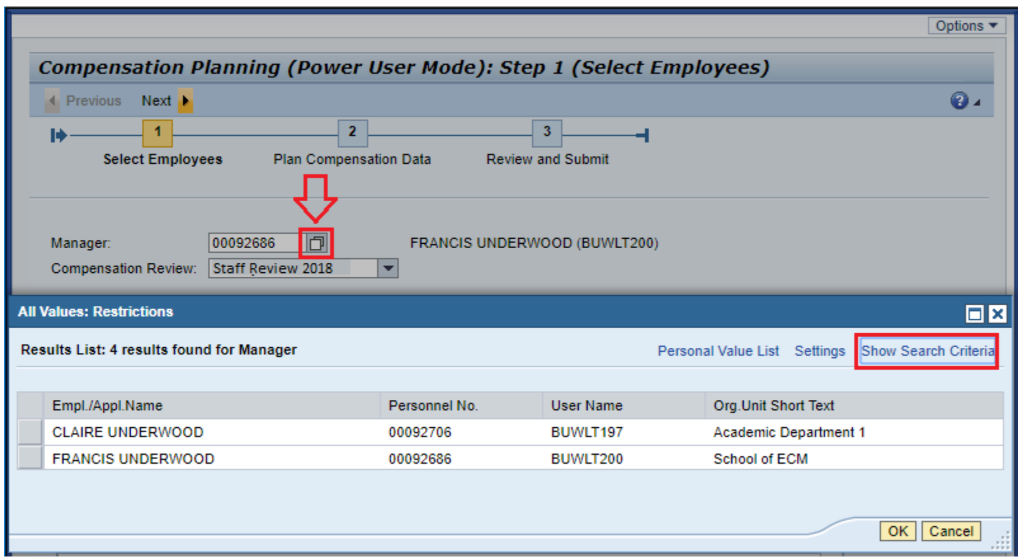
# Manager Recommendation for Staff Merit Increase

## Planning for Employees 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 Claire Underwood use *Underwood*. 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 select employees and plan recommendations or go to step 5 on page 1.