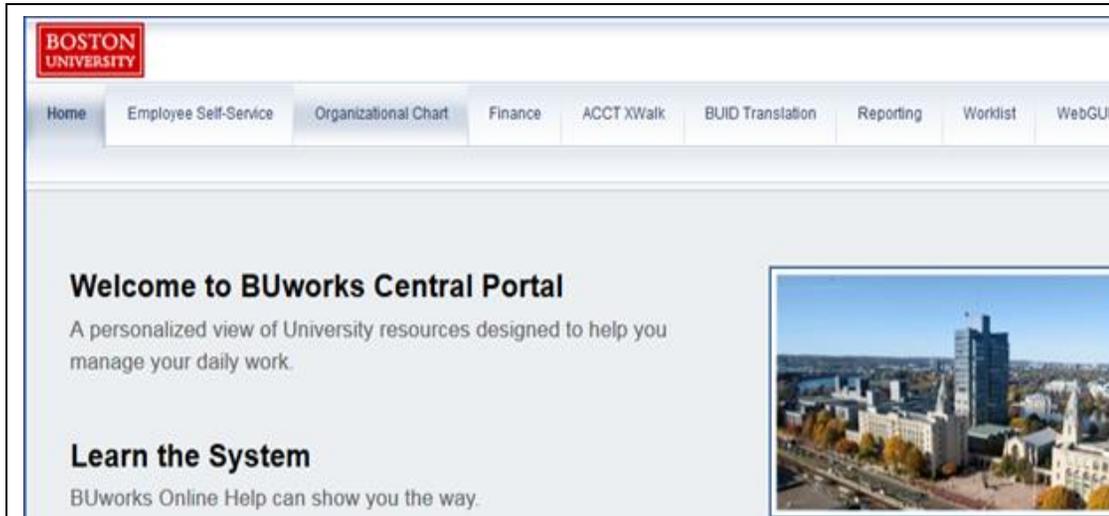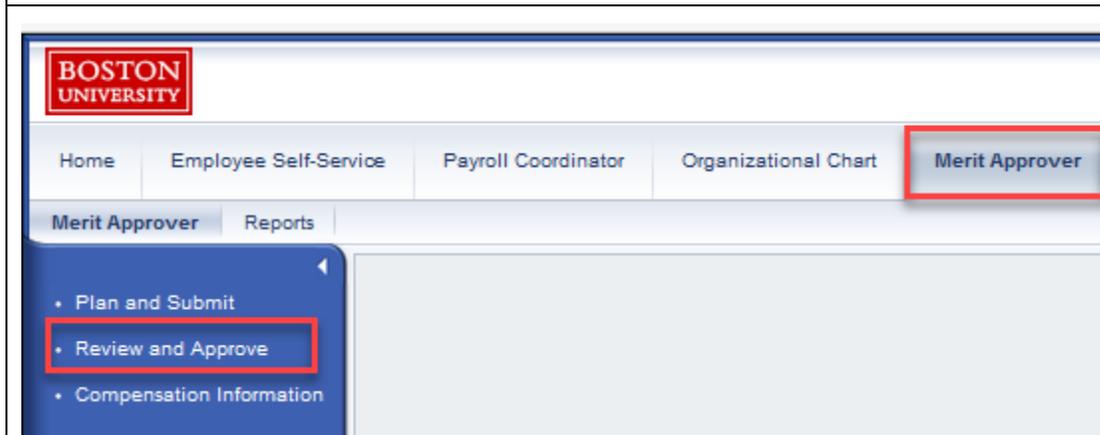# Manager Approval for Faculty Recommendations

A merit approver needs to review and approve a submission for merit increase/adjustment/promotion/retention upon submission of a faculty recommendation by a manager in his/her org unit during the annual compensation review process.
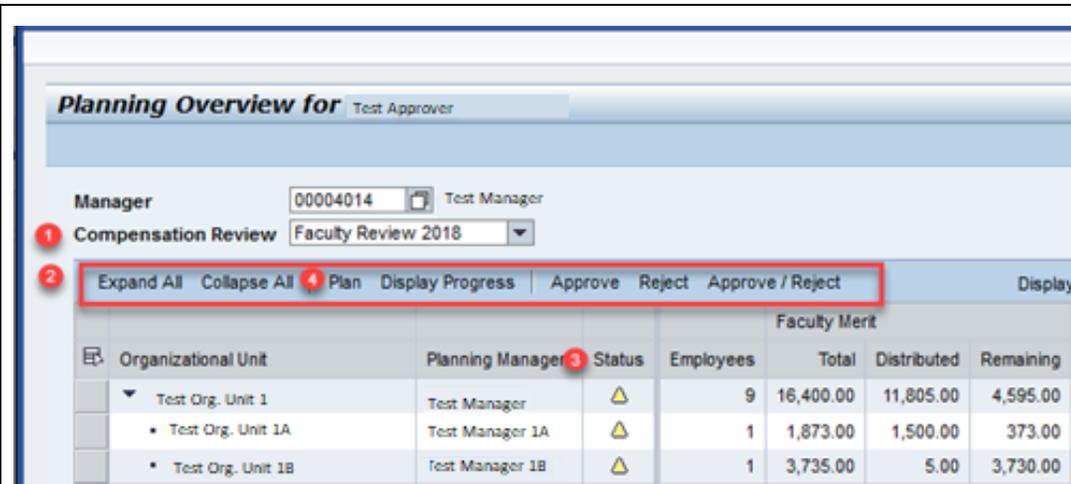
	Log on to **BUworks Central**: **https://ppo.buw.bu.edu**
	1. Click on the **Merit Approver** tab 2. Click on **Review and Approve**

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

2. To select an Org Unit, click on the **org unit name** (note that you can expand org units by clicking the arrow next to the unit or highlighting unit and pressing "Expand All"). For approver processing, you have 3 options to choose from:
    *   Approve
    *   Reject
    *   Plan (see step 4)

    If you are ready to approve or reject a planned and submitted (yellow triangle) org unit, highlight the org and click **approve** (or reject) and confirm your action on the pop-up warning. Once you confirm your action the org's status will change from yellow to green (approved) or yellow to red (sets unit back to "in planning")

3. The status column shows if an org unit is in *planning mode* (red circle🔴), *needs approval* (yellow triangle⚠) or *approved* (green square🟩)

4. If you wish to see details of a planned unit or to re-plan a unit, highlight the unit, click **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

Also note, from the approval screen you can see the total guideline and spend for your org units. The total, distributed and remaining guideline in the Merit/Adjustment is displayed all for subunits

Congratulations! You have successfully **approved** a faculty recommendation submitted by a manager.

PLANNING COMPENSATION

1. Clicking on **Plan** will take you to the **Plan Compensation Data** screen. You can make recommendations for an increase in either of two ways: **Worksheet** (shown below) mode or **Individual Planning** mode

2. To begin re-planning/planning for employees in the Worksheet mode, click on **employee name**. Any employees with non-grayed out boxes could be re-planned. For a planning in worksheet mode follow the directions below

Screen Overview	Description
1. Guideline	Guideline for Merit/Adjustment categories
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. Can be used for recording additional information regarding the increase

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. These notes do not replace the Dean's comments and can be used for recording any additional information regarding an increase

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

1. To **re-save** any changes you have made, click on **Save**. A confirmation message "**The compensation planning has been successfully saved**" will be displayed. Please note, if you are making **updates** to an org unit that was in **submitted status** you just need to click **Save**

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

1. If you were making changes to a unit that was in **Planning Status**, click on **Review** and **Submit**

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.

5/31/2018

Manager Approval for Faculty Recommendations

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.
	1. To view the guideline in 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
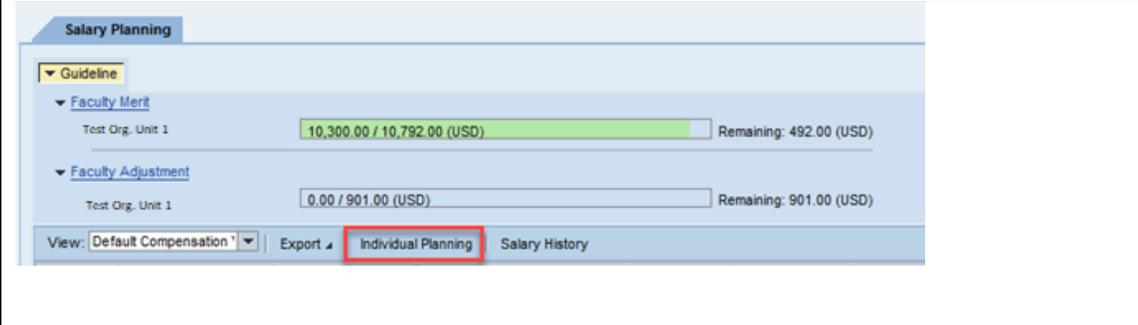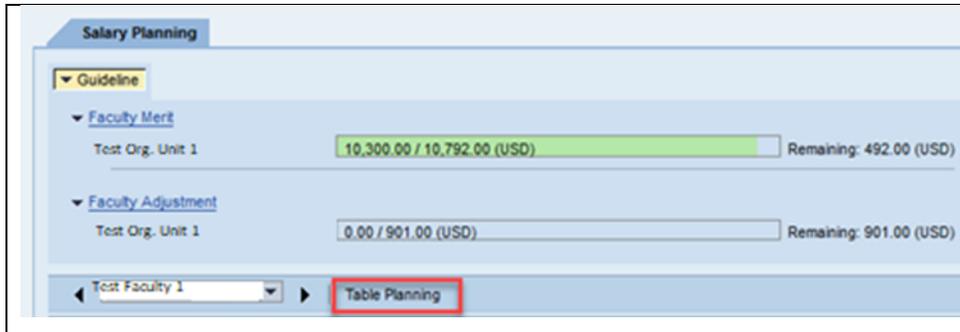
1. At any time to return to table format, click on **Table Planning**
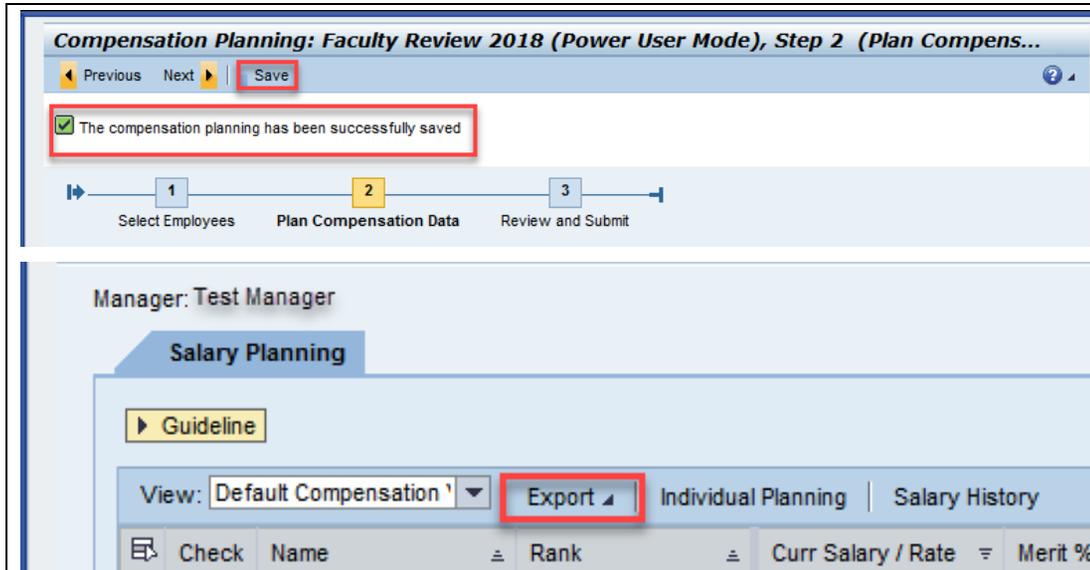
3. To **re-save** any changes you have made, click on **Save**. A confirmation message "**The compensation planning has been successfully saved**" will be displayed. Please note, if you are making **updates** to an org unit that was in **submitted status** you just need to click **Save**

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

Compensation Planning: Faculty Review 2018 (Power User Mode), Step 3 (Review and Submit) ◀ Previous Next ▶ Submit Planning ⇥ ─ 1 ─── 2 ─── 3 ─ ⊣ Select Employees Plan Compensation Data Review and Submit	1. If you were making changes to a unit that was in **Planning Status**, click on **Review** and **Submit** 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
BOSTON UNIVERSITY Home Employee Self-Service Payroll Coordinator Organizational Chart **Merit Approver** Merit Approver Reports • Plan and Submit • Review and Approve • Compensation Information	A Merit Approver can also **plan and submit** recommendations for his/her eligible reports. Please refer to Faculty Merit Recommendation guide for instructions

5/31/2018