Employee Merit (EM)

- Web based system
- Distributes annual salary and other increases for the upcoming fiscal or academic year
- Released in May to “Owners” who control the process within their units
- EM website includes essential information for current year

www.udel.edu/prm/EM/index.html

Employee Merit (EM) Instructions

- Information
- Screen Navigation Aids
- Tutorial
- Owners and Final Approvers
- System Login
- Minimum Wage Guide
Employee Merit (EM) used for collecting:

- Merit Increases
- Structural Increases
- Auto Increases
- Equity Increases
- Other Increases
- Add/Remove Admin Supplement
- Add/Remove 1/9th

These three also require an Employee Merit JED:

- Chair ↔ Faculty
- Career Ladder Promotions
- Faculty Promotions
Employee Merit Roles:

- **Owner**
  - Receives EM System first; drives the process
  - May enter EM for groups/personnel categories
  - May route groups/categories to Editors, Contract Changers
  - Routes to Final Approver when EM entry is complete

- **Editor**
  - Enters EM for groups/categories sent by Owner/other Editors
  - Routes groups/categories to other Editors, Contract Changers, and Approvers

- **Contract Changer (new this year)**
  - Updates faculty contract information
  - No access to EM pages unless they have additional roles

- **Approver**
  - Approves screens once EM has been entered and routes the HR Office

- **Viewer**
  - Makes no changes to EM – view only
  - Typically financial personnel and business administrators
Employee Merit Eligibility:

An employee must:

- have been hired prior to 4/1 for non-faculty
- have been hired prior to the end of the spring semester for faculty
- not have a negotiated salary
Owner Checklist – Managing the EM Process

1. Read/share with Editors info about current year EM - www.udel.edu/prm/EM/index.html

2. Email from HR: EM System released – log-in to system

3. Groups page – adjust pool amounts within Categories if needed

4. Routing page – route Groups/Categories to Editor(s) to enter EM $$ (optional)

5. Routing page – route Groups/Categories to Contract Changers(s) to update faculty contracts

6. Groups page - if using Editors, monitor EM entry progress; follow-up as needed

7. Summary page – if not using Editors, follow “Owner/Editor Steps for Entering EM $”

8. Groups and Summary pages - when all EM entry is complete – review entries as desired

9. Routing page – route Groups to (Final) Approver
Owner Checklist
Managing the Employee Merit Process
1. Read (and share with other Editors) **Information** about current year’s Employee Merit

HR ends email to Owners: EM System released.

2. Log-in to system and click the current link

Select **current** link to enter this year’s merit increases
Or view a **previous** year

www.udel.edu/prm/EM/index.html
Owner Checklist for Managing the EM Process: Step #3 – Adjust EM pools

Groups page:
Adjust EM pools if needed. Merit Pool amounts can be redistributed among the *same* category, but not to a *different* category.

If you make any changes, click the **Save changes** button

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**Group** is often the same name as a department and is typically comprised of the same individuals from that department. A Group could also be all of the Managers in a unit or Chairs in a college. **Category** is the employee type, such as exempt or fulltime faculty.
Owner Checklist for Managing the EM Process: Steps #4 & #5 – Route to others

Routing page:
4. Route **Groups/Categories** to Editor(s) to enter the EM $ (if this is the practice in your area).
5. Route **Groups/Categories** to Contract Changer(s) to update faculty contracts.

Route a **Group (1)** or specific **Categories (2)**. The **Send to** dropdown includes anyone with Owner, Editor, Contract Changer, and Approver access for that Group.

**Comments** can be entered when routing, such as deadlines to return groups when routing to the Editor(s) & Contract Changer(s).

A system-generated email (with your comments) will be sent to anyone to whom you’ve routed EM Groups/Categories.
Owner Checklist for Managing the EM Process: Step #6 – Monitor entry progress

Groups page, if using Editors:

- Monitor the EM entry progress and follow-up as needed during the EM entry period. The **Balance** and **Used** columns change based on entries from the Summary pages.

- Check the **Balance** amounts to see if the EM $ have been completely spent or over spent. (Note: The amounts in the Category columns do not change based on $ entered on the Summary page. These amounts are the defined pool for that category in that group.)

- Contact the **Current holder** with the email links provided when needed.

<table>
<thead>
<tr>
<th>Group</th>
<th>Total</th>
<th>Used</th>
<th>Balance</th>
<th>Exempt</th>
<th>Non-exempt</th>
<th>FT faculty</th>
<th>PT faculty</th>
<th>Post doc. / Limit term</th>
<th>Chair</th>
<th>Current holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spells &amp; Potions (00004)</td>
<td>94,696</td>
<td>94,696</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>Hogwarts Chairs (00001)</td>
<td>11,383</td>
<td>11,383</td>
<td>0</td>
<td></td>
<td></td>
<td>2157</td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>Astrological Studies (00002)</td>
<td>26,765</td>
<td>7591</td>
<td>19,164</td>
<td></td>
<td>19,164</td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>Magical Creatures (00003)</td>
<td>109,819</td>
<td>109,819</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>Hogwards History (00005)</td>
<td>69,147</td>
<td>69,147</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
<td>McGonagall, Minerva</td>
</tr>
</tbody>
</table>
Summary page, if you’re not using Editors, and you enter some or all EM $ distributions:
Follow detailed instructions: “Owner/Editor Steps for Entering EM $”
Owner Checklist for Managing the EM Process: Step #8 – Verify pools not overspent

Groups and Summary pages:
When all EM entries are complete, review entries as desired.

Group page:
Verify the merit pool for your all your Groups in total are not overspent. The **Balance** amount should be zero or higher; a negative amount means the pool is overspent.

In this example, the **Balance** amount is 0, and the **Used** amount equals the **Total**, thus the merit pool has been fully distributed. Watch for a negative amount in Balance, this means the pool is overspent.
9. Routing page
After you’ve reviewed the EM entries and verified the EM totals are good, route the EM pages to the (Final) Approver.

The Approver will get an email with your comments alerting him/her about the EM Groups requiring his/her attention.

(Note: The Approver approves the EM Groups by routing them to HR Office.)
Owner/Editor
Outline for Entering Employee Merit $
Owner/Editor Outline for Entering EM $:

1. Groups page – select which Groups/Categories to work with

2. Summary page - consider downloading data to Excel to try different scenarios

3. Summary page - for each employee in selected Group/Category:
   – Check for retiring/terminated employees – remove from pool
   – Remove Ninths and Supplements as needed
   – Enter EM by Merit %, Merit increase or EM annual rate (perhaps based on Excel worksheet)
   – Look for situations that require EM-JEDs

4. Summary page - verify EM pool total is not overspent; adjust as needed

5. Repeat Steps 1-4 until all Groups/Categories have EM $ distributed

6. Editor – Email Owner that you’ve completed EM entries
Owner/Editor
Steps for Entering Employee Merit $
Owner/Editor Steps for Entering EM $:  Step #1 – Groups

Groups page:
There are three ways to select the Groups and/or Categories of employee with which to work:

a. Click on one of the Group names to select all categories for one group
b. Click one of the Category buttons to select one category of employees for all groups
c. Click the Choose groups & categories button (details on next slide)
Owner/Editor Steps for Entering EM $: Step #1 c. – Choose groups & categories

Choose groups & categories button allows you to customize your selection by both Group and Category.

Use the pop-up window to select one or multiple (with CTRL key) groups and categories.

Note: To reset to all Groups/Categories again, select All groups and All categories in this pop-up window.
Summary page
Consider **downloading to Excel** to try different scenarios, prior to making entries in the EM System.

<table>
<thead>
<tr>
<th>Information</th>
<th>Employee</th>
<th>Action</th>
<th>Rating</th>
<th>Old annual rate</th>
<th>Merit %</th>
<th>Merit increase</th>
<th>Structural increase</th>
<th>EM annual rate</th>
<th>JEX increase</th>
<th>EM annual rate with JED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Filch, Argus</td>
<td>Remove employee from pool</td>
<td>4</td>
<td>54,940</td>
<td></td>
<td></td>
<td>0</td>
<td>54,948</td>
<td>0</td>
<td>54,948</td>
</tr>
<tr>
<td></td>
<td>Pomfrey, Poppy</td>
<td>Remove employee from pool</td>
<td>4.7</td>
<td>54,107</td>
<td></td>
<td></td>
<td>0</td>
<td>54,107</td>
<td>0</td>
<td>54,107</td>
</tr>
<tr>
<td></td>
<td>Pince, Irma</td>
<td>Remove employee from pool</td>
<td>80,000</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>80,000</td>
<td>0</td>
<td>80,000</td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus</td>
<td>Remove employee from pool</td>
<td>158,097</td>
<td></td>
<td></td>
<td></td>
<td>0</td>
<td>158,097</td>
<td>0</td>
<td>158,097</td>
</tr>
</tbody>
</table>
Owner/Editor Steps for Entering EM $: Step #2 – downloading to Excel

Downloading data to Excel will give you pop-up notifications when in progress (a), when successful (b), and with the Excel spreadsheet (c).
**Owner/Editor Steps for Entering EM $:** **Step #2 – Downloading to Excel**

Once downloaded, you can enter multiple scenarios to determine which one to use to enter onto the merit screens.

(IMPORTANT - do not alter the calculations or formulas on the spreadsheet.)

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>Personnel Category</td>
<td>Emplid</td>
<td>Name</td>
<td>Over max/UnEarn Code</td>
<td>Old Annual Rate</td>
<td>Merit %</td>
<td>Merit $</td>
<td>EM Annual Rate</td>
<td></td>
</tr>
<tr>
<td>00002 ASTROLOGICAL STUDIES</td>
<td>Exempt</td>
<td>800000001 Filch, Argus</td>
<td>REG</td>
<td>54,948</td>
<td>1.00</td>
<td>549</td>
<td>55,497</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00002 ASTROLOGICAL STUDIES</td>
<td>Exempt</td>
<td>800000013 Pomfrey, Poppy</td>
<td>REG</td>
<td>54,101</td>
<td>2.05</td>
<td>1,109</td>
<td>55,216</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00002 ASTROLOGICAL STUDIES</td>
<td>Exempt</td>
<td>800000027 Prince, Irma</td>
<td>REG</td>
<td>80,000</td>
<td>0.75</td>
<td>600</td>
<td>80,600</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00002 ASTROLOGICAL STUDIES</td>
<td>Exempt</td>
<td>800000999 Hagrid, Rubeus</td>
<td>REG</td>
<td>158,097</td>
<td>1.25</td>
<td>1,976</td>
<td>160,073</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Two reasons to download EM data to Excel:
1. Before Merit amounts are entered, so that you can use spreadsheet to try different scenarios.
2. After Merit amounts are entered, so you can share the final EM distribution with people who do not have access to EM system (e.g. chairs, financial managers, etc.).
Owner/Editor Steps for Entering EM $: Step #3 – Faculty EM entry page

Summary page is programmed to display only the applicable columns for each Category type.

Faculty page includes columns for Structural increase, Auto increase and Other increase, as well as the three merit columns and five for contract information.

<table>
<thead>
<tr>
<th>Information</th>
<th>Employee</th>
<th>Action</th>
<th>Rating</th>
<th>Old annual rate</th>
<th>Merit %</th>
<th>Merit increase</th>
<th>Structural increase</th>
<th>Auto increase</th>
<th>Other increase</th>
<th>EM annual rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sprout, Pomona (800000301)</td>
<td><a href="mailto:sprout@pomona.com">sprout@pomona.com</a></td>
<td>Remove employee from pool</td>
<td></td>
<td>204,342</td>
<td>2.00</td>
<td>4087</td>
<td>1300</td>
<td>0</td>
<td>0</td>
<td>209729</td>
</tr>
<tr>
<td>Sprout, Pomona – Ninth line</td>
<td><a href="mailto:Sprout@pomona.com">Sprout@pomona.com</a></td>
<td>Remove Ninth line</td>
<td></td>
<td>22,705</td>
<td></td>
<td></td>
<td></td>
<td>23,393</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprout, Pomona – Admin. supplement</td>
<td><a href="mailto:Sprout@pomona.com">Sprout@pomona.com</a></td>
<td>Remove Admin. supplement</td>
<td></td>
<td>5,000</td>
<td></td>
<td></td>
<td></td>
<td>5,000</td>
<td></td>
<td>5,000</td>
</tr>
<tr>
<td>Moody, Alastor (800000777)</td>
<td><a href="mailto:moody@pomona.com">moody@pomona.com</a></td>
<td>Remove employee from pool</td>
<td></td>
<td>139,366</td>
<td>2.00</td>
<td>2707</td>
<td>1000</td>
<td>0</td>
<td>0</td>
<td>143153</td>
</tr>
</tbody>
</table>

Note – Rating is not loaded in the EM system for faulty.
Owner/Editor Steps for Entering EM $: Step #3 – Exempt/Non-Exp entry page

The **Exempt** & **Non-exempt** pages only have **Merit %**, **Merit increase** and **EM annual rate** input columns.

Note – **Rating** is loaded in the EM system for exempt and non-exempt staff.
Owner/Editor Steps for Entering EM $: Step #3 – Post Docs/Lim. Term entry page

Post doc. & Limited term page only has one input columns for EM annual rate, since this Category does not get EM increases.

<table>
<thead>
<tr>
<th>Information</th>
<th>Employee</th>
<th>Action</th>
<th>Rating</th>
<th>Old annual rate</th>
<th>EM annual rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Filch, Argus (800000001)</td>
<td></td>
<td></td>
<td>40,000</td>
<td>40,000</td>
</tr>
<tr>
<td></td>
<td>Pomfrey, Poppy (800000013)</td>
<td></td>
<td></td>
<td>42,000</td>
<td>42,000</td>
</tr>
<tr>
<td></td>
<td>Pince, Irma (800000027)</td>
<td></td>
<td></td>
<td>45,000</td>
<td>45,000</td>
</tr>
</tbody>
</table>
Owner/Editor Steps for Entering EM $: Step #3 – Additional Features

Scroll to the right to see the additional columns on the Summary page.
Use this button to show/hide columns to suit your needs.

Every column heading has a button to sort the data in either ascending or descending order.
E.G. It may be useful to sort by Appraisal Rating before distributing the EM $$.

Click on employee name to see pop-up with details about the employee.
**Owner/Editor Steps for Entering EM $: Step #3 – Information column icons**

<table>
<thead>
<tr>
<th>Information</th>
<th>Employee</th>
<th>Action</th>
<th>Rating</th>
<th>Old annual rate</th>
<th>Merit %</th>
<th>Merit increase</th>
<th>Structural increase</th>
<th>EM annual rate</th>
<th>JED increase</th>
<th>EM annual rate with JED</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Filch, Argus (800000001)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>54,948</td>
<td></td>
<td>54,948</td>
</tr>
<tr>
<td></td>
<td>Pomfrey, Poppy (800000013)</td>
<td></td>
<td></td>
<td></td>
<td>3</td>
<td>54107</td>
<td></td>
<td>54,107</td>
<td></td>
<td>54,107</td>
</tr>
<tr>
<td></td>
<td>Pince, Irma (800000027)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80,000</td>
<td></td>
<td>80,000</td>
<td></td>
<td>80,000</td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus (800000999)</td>
<td></td>
<td></td>
<td></td>
<td>40</td>
<td>158097</td>
<td></td>
<td>158,097</td>
<td></td>
<td>158,097</td>
</tr>
</tbody>
</table>

**Key to the icons in the Information column:**

- Used to **enter** comments and **displays** the number of comments entered. Some changes require Comments, such as when someone is removed from the merit pool.
- Annual rate is at or over the maximum
- Annual rate is under the minimum
- 40-hour employee
- Retired and $ removed from merit pool
- Terminated and $ removed from merit pool
- Old annual rate has changed (this will adjust the **EM annual rate**)

**Note** - You can print the PDF document called “EM - Key for Information Icons” for more information about these icons.
Owner/Editor Steps for Entering EM $:  **Step #3 – EM Summary page entry**

a. Check **Information** for retiring or terminated employees: remove from the pool if person is leaving prior to 7/1 or 9/1 (for fiscal and academic year employees, respectively).
b. Remove from pool: anyone with negotiated salary or moving to non-benefited position
c. Check Ninths and Salary supplements: use checkboxes to remove as needed
d. Enter EM by: **Merit %, Merit Increase** or **EM annual rate**
e. Look for situations that require Employee Merit JEDs: Chair ↔ Faculty, Career Ladder Promotions, Faculty Promotions
Owner/Editor Steps for Entering EM $: Step #4 – Verify Merit Totals

Summary page
Verify EM pool total is not overspent; adjust as needed.

Scroll to the Group Category to see Merit Pool $ (a) and Spent $ (b)

The bottom left-hand corner of the Group Category shows Totals: $ Merit Increase (c). This total will match the Spent $ (b) amount.

These numbers (a, b and c) should match or the Spent $ (b) and Totals (c) number should be less than the Merit Pool $ (a).

If the Spent $ (b) and Totals (c) number is more than Merit Pool $ (a), this means you have overspent the pool. You will get a pop-up message (see following page.)

Click the Save changes button when you’re done.
If the **Spent $** and **Totals** number is more than **Merit Pool $**, you have overspent the pool.

You will receive this pop-up notification when saving alerting you that you have overspent your pool. This is informational and does not prevent the information from saving.
Owner/Editor Steps for Entering EM $: Step #5 – Repeat process for add’l Groups

Group and Summary pages
Repeat Steps 1-4 until all Groups/Categories have EM $ distributed.

Owner/Editor Steps for Entering EM $: Step #6 – Notify Owner / Route to Approver

Editor – Email the Owner that you’ve completed the EM entries (if this is the practice in your area)

Owner - Routing page
Route EM Screens to Approver (if this is the practice in your area). Enter comments to go with email notification if needed.
Need more information about Employee Merit? Contact Records Management

Email: em-access@udel.edu

Phone: 831-8677

Website: www.udel.edu/prm/EM/index.html