

# Employee Merit System Final Approver Instructions

May 2015

# 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](http://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 1/9<sup>th</sup>

These three also require an Employee Merit JED:

- Chair ↔ Faculty
- Career Ladder Promotions
- Faculty Promotions

# Employee Merit (EM) 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

- Reviews / approves screens once EM has been entered
- Routes the EM pages to the HR Office

## Viewer

- Makes no changes to EM – view only
- Typically financial personnel and business administrators

# Final Approver – Reviewing / Approving Employee Merit

1. Email from EM System lets you know Owner has routed EM pages to you
  - Log-in to EM System
2. Groups page – select which Groups/Categories to work with
3. Summary page – review/change Employee Merit as needed
  - Save changes
4. Summary page – if changes made to EM \$, verify EM pool total is not overspent
  - Adjust EM \$ if needed
5. Repeat Steps 2-4 until all Groups/Categories have been reviewed/changed
6. Groups page – verify all Groups' totals are not overspent
7. Routing page – route Groups to HR to indicate your approval

Final Approver  
Steps for Reviewing/Approving  
Employee Merit \$

# Final Approver Steps for Approving EM \$: **Step #1 – Login to EM System**

After receiving email that an Owner has routed EM Groups to you, log-in to the EM System.

The screenshot displays the 'Employee Merit' system interface. At the top, a dark blue header contains the text 'Employee Merit'. Below this, the user's name 'User: McGonagall, Minerva' is shown. A 'Menu' section follows, with a note: 'If you have questions, refer to the [Employee Merit Documentation](#) for help, or contact the IT Support Center at (302) 831-6000.' Below the note is a 'Symbol key' indicating that a red asterisk (\*) denotes 'Required information' and a red triangle (▲) denotes 'Error'. The interface is divided into two main sections: 'Current' and 'Previous'. The 'Current' section contains a single link: '• [15-16 Employee Merit Increase](#)', which is circled in red. A green callout box points to this link with the text: 'Select **current** link to enter this year's merit increases' and 'Or view a **previous** year'. The 'Previous' section contains three links: '• [14-15 Employee Merit Increase CLOSED](#)', '• [12-13 Employee Merit Increase](#)', and '• [12-13 Employee Merit Increase CLOSED](#)'.

# Final Approver Steps for Approving EM \$: **Step #2 – Select Groups**

## Groups page:

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

- Click on one of the **Group** names to select all categories for one group
- Click one of the **Category** buttons to select one category of employees for all groups
- Click the **Choose groups & categories** button (details on next slide)

**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.

Group	Total	Used	Balance	Exempt	Non-exempt	FT faculty	PT faculty	Post doc. / Limit term	Chair	Current holder
SPELLS & POTIONS (00004)	94,698	0	94,698			92046	2652			Proctor, Nancy Ann
HOGWARTS CHAIRS (00001)	11,383	0	11,383	2157					9226	Proctor, Nancy Ann
ASTROLOGICAL STUDIES (00002)	26,755	0	26,755	19164	7591					Proctor, Nancy Ann
MAGICAL CREATURES (00003)	109,819	0	109,819			108511	1308			Proctor, Nancy Ann
HOGWARTS HISTORY (00005)	69,147	0	69,147			67711	1436			Proctor, Nancy Ann

## Final Approver Steps for Approving EM \$: **Step #2 – Choose groups & categories**

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

Use the CTRL key to select *multiple* groups and categories.

Choose groups & categories

Minerva

tor, Nancy Ann

OS

questions, refer to the Employee Me

\* Required information, △ Error

Groups to display:

- All groups
- ASTROLOGICAL STUDIES (0
- HOGWARTS CHAIRS (0000
- HOGWARTS HISTORY (000

Categories to display:

- All categories
- Exempt
- Non-exempt
- Full-time faculty

Submit

Used	Balance	Exe			
0	94,698			92046	2652
0	11,383	2157			

Note: To reset to all Groups/Categories again, select **All groups** and **All categories** in this pop-up window.

# Final Approver Steps for Approving EM \$: **Step #3 – Faculty Merit entry page**

**Summary page** is programmed to display only the applicable columns for each **Category type** for that merit year.

**For example** - if there is a faculty **Structural Increase** then that column would display in the Full-Time and Part-Time Faculty category.

Groups Exempt Non-exempt FT faculty PT faculty Chair

ASTROLOGICAL STUDIES (00002)

Full-time faculty

Show / hide columns

Information	Employee	Action	Rating	Old annual rate	Merit %	Merit increase	Structural increase	Auto increase	Other increase	EM annual rate
 	Sprout, Pomona (800000301)	<input type="checkbox"/> Remove employee from pool 		204,342	<input type="text" value="2.00"/>	<input type="text" value="4087"/>	<input type="text" value="1300"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="209729"/>
	Sprout, Pomona – Ninth line	<input type="checkbox"/> Remove Ninth line		22,705						<input type="text" value="23,303"/>
	Sprout, Pomona – Admin. supplement	<input type="checkbox"/> Remove Admin. supplement		5,000						<input type="text" value="5,000"/>
 	Moody, Alastor (800000777)	<input type="checkbox"/> Remove employee from pool 		139,366	<input type="text" value="2.00"/>	<input type="text" value="2787"/>	<input type="text" value="1000"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="143153"/>

 Cancel changes  Download to spreadsheet  Save changes

# Final Approver Steps for Approving EM \$: Step #3 – Add'l Features, Summary page

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



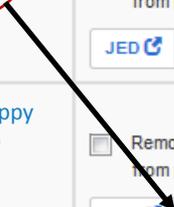
ASTROLOGICAL STUDIES (00002)

Exempt

Show / hide columns

Information	Employee	Action	Rating	Old annual rate	Merit %	Merit increase	Structural increase	EM annual rate	JED increase	EM annual rate with JED
	Filch, Argus (800000001)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4	5						54,948
	Pomfrey, Poppy (800000013)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4.7	5						54,107
	Pince, Irma (800000027)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>						80000		80,000
	Hagrid, Rubeus (800000999)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>						158097		158,097

Save changes



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.

Filch, Argus (800000001)

Grade: 29S

Benefits service date: 08/01/1998  
Years: 16    Months: 7    Days: 25

Job title: Computing Support Spec II

Position entry date: 10/01/2005  
Years: 9    Months: 5    Days: 25

Close

# Final Approver Steps for Approving EM \$: **Step #3 – Information column icons**

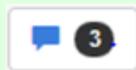
ASTROLOGICAL STUDIES (00002)

Exempt

Show / hide columns

Information	Employee	Action	Rating	Old annual rate	Merit %	Merit increase	Structural increase	EM annual rate	JED increase	EM annual rate with JED
	Filch, Argus (800000001)	<input type="checkbox"/> Remove employee from pool	4	54,948	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="54948"/>		<input type="text" value="54,948"/>
	Pomfrey, Poppy (800000013)							<input type="text" value="54107"/>		<input type="text" value="54,107"/>
	Pince, Irma (800000027)							<input type="text" value="80000"/>		<input type="text" value="80,000"/>
 	Hagrid, Rubeus (800000999)							<input type="text" value="158097"/>		<input type="text" value="158,097"/>

## 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**)

# Final Approver Steps for Approving EM \$: **Step #3 – Review/change EM\$**

## Summary page

Review or change EM \$ amounts: **Merit %**, **Merit Increase** or **EM annual rate**

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

ASTROLOGICAL STUDIES (00002)

Exempt

Show / hide columns

Information	Employee	Action	Rating	Old annual rate	Merit %	Merit increase	EM annual rate	JED increase
	Filch, Argus (800000001)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4	54,948	<input type="text" value="1.00"/>	<input type="text" value="549"/>	<input type="text" value="55497"/>	
	Pomfrey, Poppy (800000013)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4.7	54,107	<input type="text" value="1.00"/>	<input type="text" value="541"/>	<input type="text" value="54648"/>	
	Pince, Irma (800000027)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>		80,000	<input type="text" value="1.00"/>	<input type="text" value="800"/>	<input type="text" value="80800"/>	
 	Hagrid, Rubeus (800000999)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>		158,097	<input type="text" value="1.00"/>	<input type="text" value="1581"/>	<input type="text" value="158,097"/>	
	Hagrid, Rubeus –Salary supplement	<input type="checkbox"/> Remove Salary supplement		0			<input type="text" value="1,581"/>	

# Final Approver Steps for Approving EM \$: **Step #4 – After changes, verify totals**

## Summary page

If you made any changes, verify EM pool total is not overspent; adjust as needed

The screenshot shows a summary page for 'ASTROLOGICAL STUDIES (00002)'. It includes a table with columns for 'Merit pool: 1% / \$4,012' and 'Spent: \$4,012'. A 'Show / hide columns' button is visible. Below the table, a 'Totals' row shows '1.00' and '\$4,012'. At the bottom, there are buttons for 'Download to spreadsheet' and 'Save changes'.

Callout 'a' points to the 'Merit pool: 1% / \$4,012' value. Callout 'b' points to the 'Spent: \$4,012' value. Callout 'c' points to the '\$4,012' value in the 'Totals' row.

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

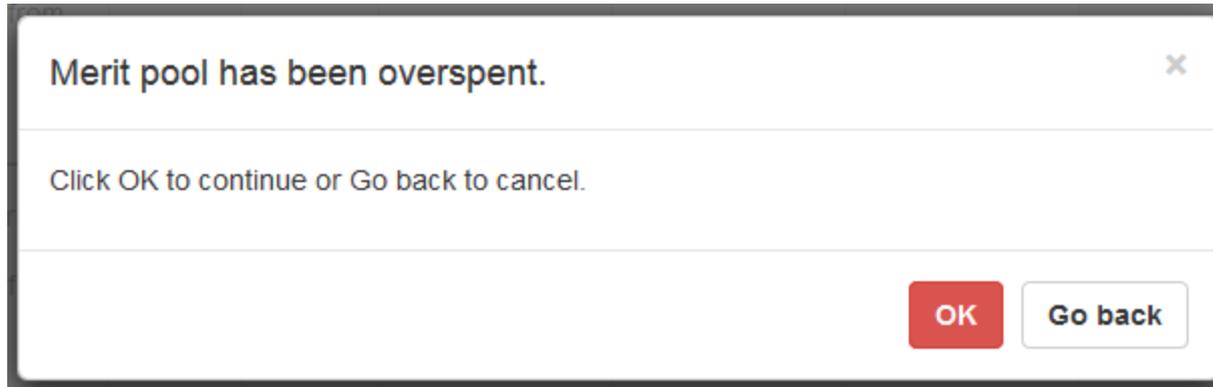
The *bottom left-hand* corner of the Group Category shows **Totals: \$ Merit Increase (c)**. This total will match the **Spent \$ (b)** amount.

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.

## Final Approver Steps for Approving EM \$: **Step #4 – Verify merit totals (cont'd)**



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.

# Final Approver Steps for Approving EM \$: **Step #5 – Repeat process for add'l Groups**

## Group and Summary pages

Repeat Steps 2-4 until all Groups/Categories have been reviewed.

# Final Approver Steps for Approving EM \$: **Step #6 – Groups, Verify Merit Totals**

## 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.

User: McGonagall, Minerva

### Groups

If you have questions, refer to the [Employee Merit Documentation](#) for help, or contact the IT Support Center at (302) 831-8000.

Symbol key: \* Required information, ▲ Error

Search:

Group ▲	Total	Used	Balance	Exempt	Non-exempt	FT faculty	PT faculty	Post doc. / Limit term	Chair	
HOGWARTS CHAIRS (00001)	11,383	390,949	0	<input type="text" value="2157"/>					<input type="text" value="9226"/>	McGonagall, Minerva ✕
ASTROLOGICAL STUDIES (00002)	26,755	390,949	0	<input type="text" value="19164"/>	<input type="text" value="7591"/>					McGonagall, Minerva ✕
MAGICAL CREATURES (00003)	109,819	0	109,819			<input type="text" value="108511"/>	<input type="text" value="1308"/>			McGonagall, Minerva ✕
<b>Adjusted totals</b>	<b>390,949</b>	<b>0</b>	<b>390,949</b>	<b>21,321</b>	<b>7,591</b>	<b>347,415</b>	<b>5,396</b>	<b>0</b>	<b>9,226</b>	
<b>Starting totals</b>	<b>390,949</b>	<b>0</b>	<b>390,949</b>	<b>21,321</b>	<b>7,591</b>	<b>347,415</b>	<b>5,396</b>	<b>0</b>	<b>9,226</b>	

7 of 7 entries

# Final Approver Steps for Approving EM \$: **Step #7 – Approve/Route to HR Office**

## Routing page

Route EM Screens to HR Office. This is your indication of approval.

Enter comments to go with email notification if needed.

15-16 > Groups Summary **Routing** Choose groups & categories

User: McGonagall, Minerva

### Routing

If you have questions, refer to the [Employee Merit Documentation](#) for help, or contact the IT Support Center at (302) 831-6000.

Symbol key: \* Required information, ▲ Error

<input checked="" type="checkbox"/> HOGWARTS CHAIRS (00001)	Send to: HR Office	Routing email comments: Merit has been distributed. thx, MM
Chair	Send to: <input type="text"/>	Routing email comments: <input type="text"/>
Exempt	Send to: <input type="text"/>	Routing email comments: <input type="text"/>
<input checked="" type="checkbox"/> ASTROLOGICAL STUDIES (00002)	Send to: <input type="text"/>	Routing email comments: <input type="text"/>

# Need more information about Employee Merit? Contact Records Management

**Email:** [em-access@udel.edu](mailto:em-access@udel.edu)

**Phone:** 831-8677

**Website:** [www.udel.edu/prm/EM/index.html](http://www.udel.edu/prm/EM/index.html)