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
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 (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.

[Image of Employee Merit system interface]
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:

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)

**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.
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.

Note: To reset to all Groups/Categories again, select All groups and All categories in this pop-up window.
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.
**Final Approver Steps for Approving EM $**: Step #3 – Add’l Features, Summary page

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<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></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pomfrey, Poppy (800000013)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pince, Irma (800000027)</td>
<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus (8000000999)</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

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- 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.
# Final Approver Steps for Approving EM $: Step #3 – Information column icons

<table>
<thead>
<tr>
<th>Information</th>
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<th>Action</th>
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<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><img src="image" alt="comment" /></td>
<td>Filch, Argus (800000001)</td>
<td>Remove employee from pool</td>
<td>4</td>
<td>54,948</td>
<td></td>
<td></td>
<td></td>
<td>54,948</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="comment" /></td>
<td>Pomfrey, Poppy (800000013)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>54,107</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="comment" /></td>
<td>Pince, Irma (800000027)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>80,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="comment" /></td>
<td>Hagrid, Rubeus (800000999)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>158,097</td>
<td></td>
<td></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.
  - ![comment](image)
    - Annual rate is at or over the maximum
  - ![comment](image)
    - Annual rate is under the minimum
  - ![comment](image)
    - 40-hour employee
  - ![comment](image)
    - Retired and $ removed from merit pool
  - ![comment](image)
    - Terminated and $ removed from merit pool
  - ![comment](image)
    - 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

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<table>
<thead>
<tr>
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<th>Merit %</th>
<th>Merit increase</th>
<th>EM annual rate</th>
<th>JED increase</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Filch, Argus (800000001)</td>
<td><img src="#" alt="Remove employee from pool" /></td>
<td>4</td>
<td>54,948</td>
<td>1.00</td>
<td>549</td>
<td>55497</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pomfrey, Poppy (800000013)</td>
<td><img src="#" alt="Remove employee from pool" /></td>
<td>4.7</td>
<td>54,107</td>
<td>1.00</td>
<td>541</td>
<td>54646</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pince, Irma (800000027)</td>
<td><img src="#" alt="Remove employee from pool" /></td>
<td>80,000</td>
<td>1.00</td>
<td>800</td>
<td>80800</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus (8000000999)</td>
<td><img src="#" alt="Remove employee from pool" /></td>
<td>158,097</td>
<td>1.00</td>
<td>1581</td>
<td>158097</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus –Salary supplement</td>
<td><img src="#" alt="Remove Salary supplement" /></td>
<td>0</td>
<td></td>
<td></td>
<td>1,581</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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.
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](image)

<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>
</tr>
</thead>
<tbody>
<tr>
<td>HOGWARTS CHAIRS (00001)</td>
<td>11,963</td>
<td>390,949</td>
<td>0</td>
<td></td>
<td>2157</td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>ASTROLOGICAL STUDIES (00002)</td>
<td>26,705</td>
<td>390,949</td>
<td>0</td>
<td></td>
<td>19164</td>
<td>7591</td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>MAGICAL CREATURES (00003)</td>
<td>109,819</td>
<td>0</td>
<td>109,819</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
</tr>
</tbody>
</table>

Adjusted totals: 390,949, 0, 390,949
Starting totals: 390,949, 0, 390,949

- [X] Cancel changes  - [ ] Download to spreadsheet  - [✓] Save changes
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.
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