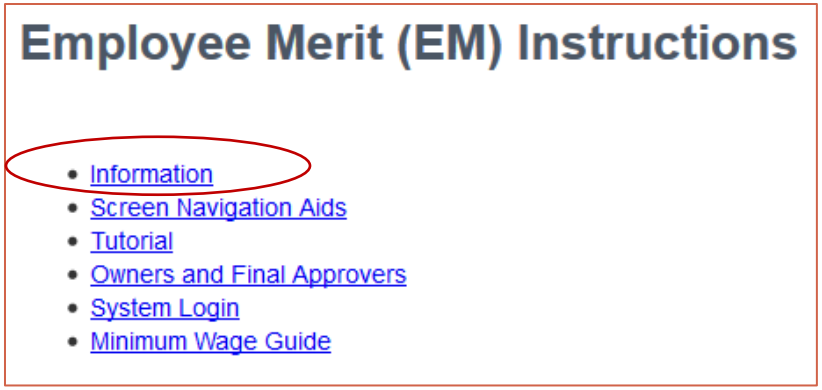
Employee Merit System
Owner / Editor
Instructions

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 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

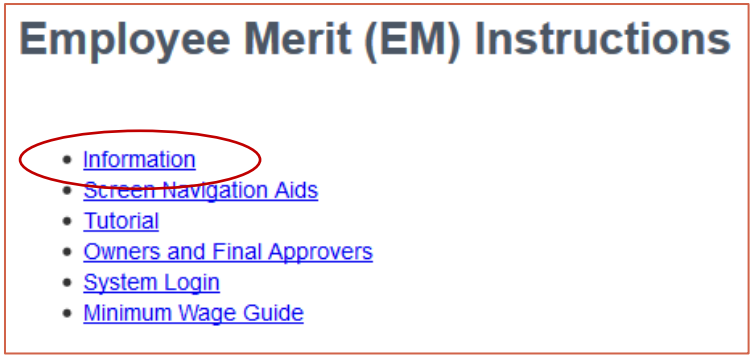
1. Read/share with Editors info about current year EM - www.udel.edu/prm/EM/index.html
2. Email from HR: EM System released – log-in to system
3. Groups page – adjust pool amounts within Categories if needed
4. Routing page – route Groups/Categories to Editor(s) to enter EM $$ (optional)
5. Routing page – 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

Owner Checklist for Managing the EM Process: Steps #1 & #2 – EM info & HR email

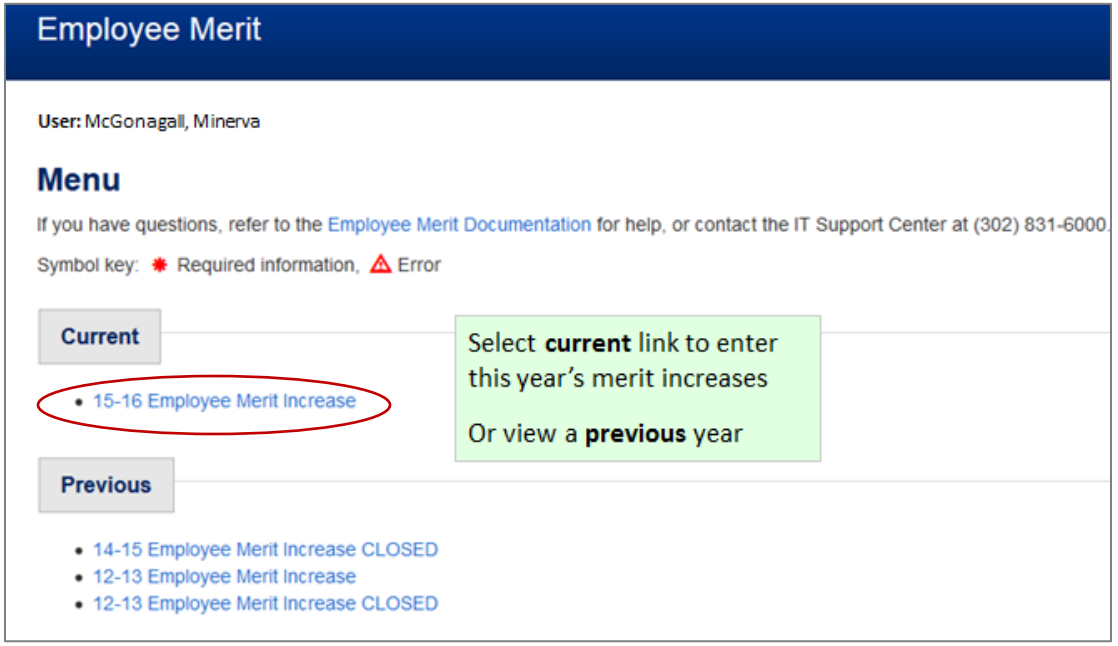
1. Read (and share with other Editors) **Information** about current year's Employee Merit

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



HR ends email to Owners: EM System released.

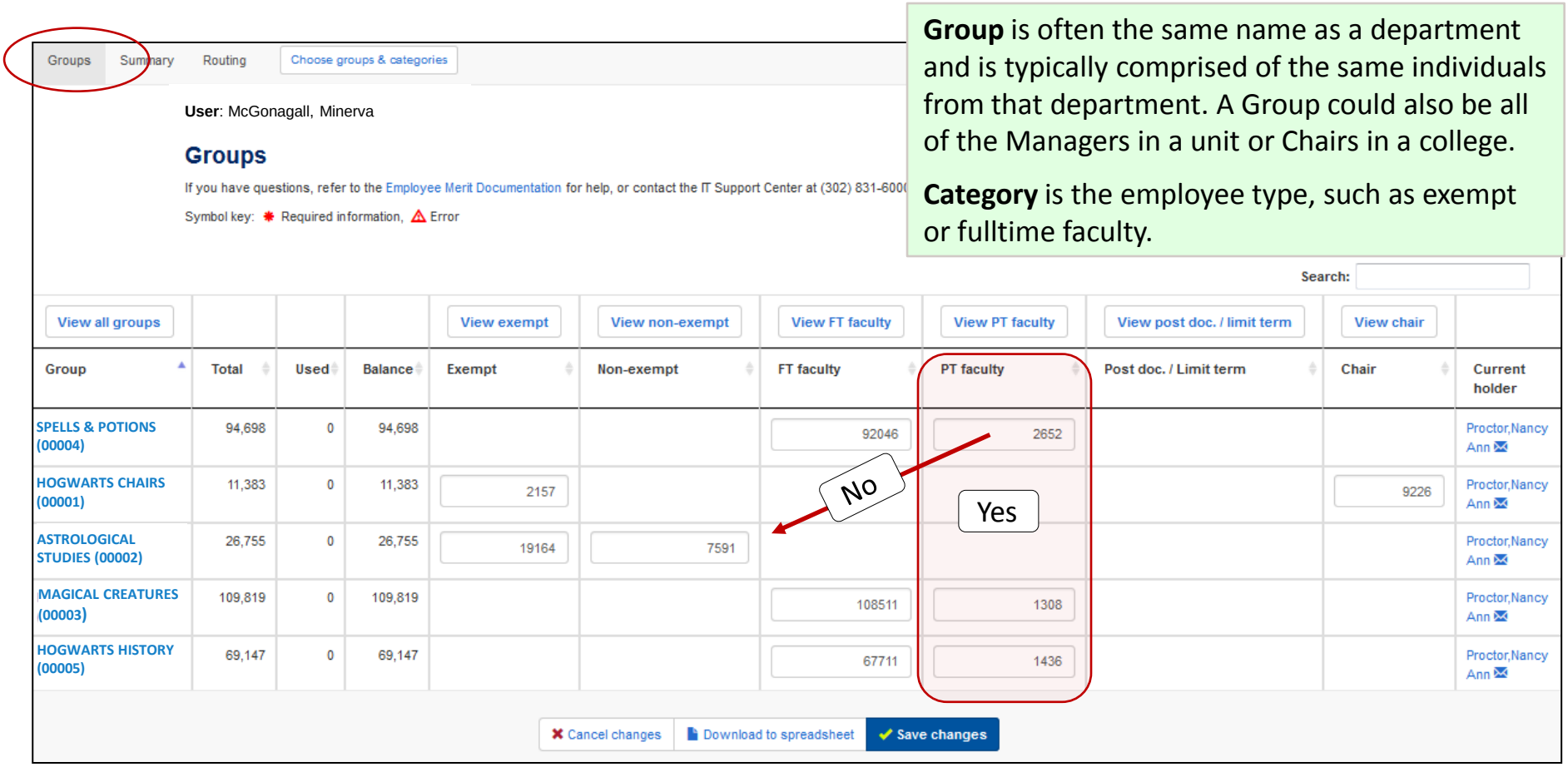
2. Log-in to system and click the current link



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



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

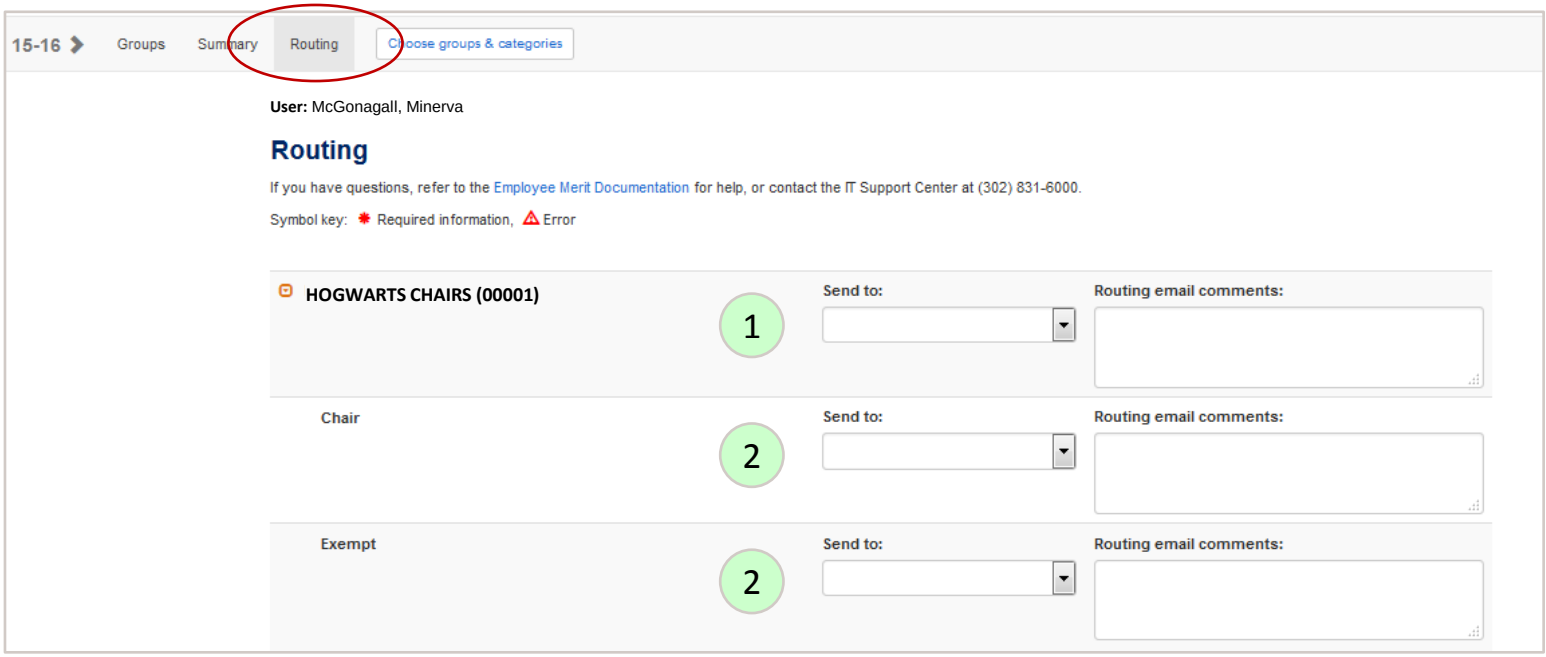
Routing page:

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 Changers(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).

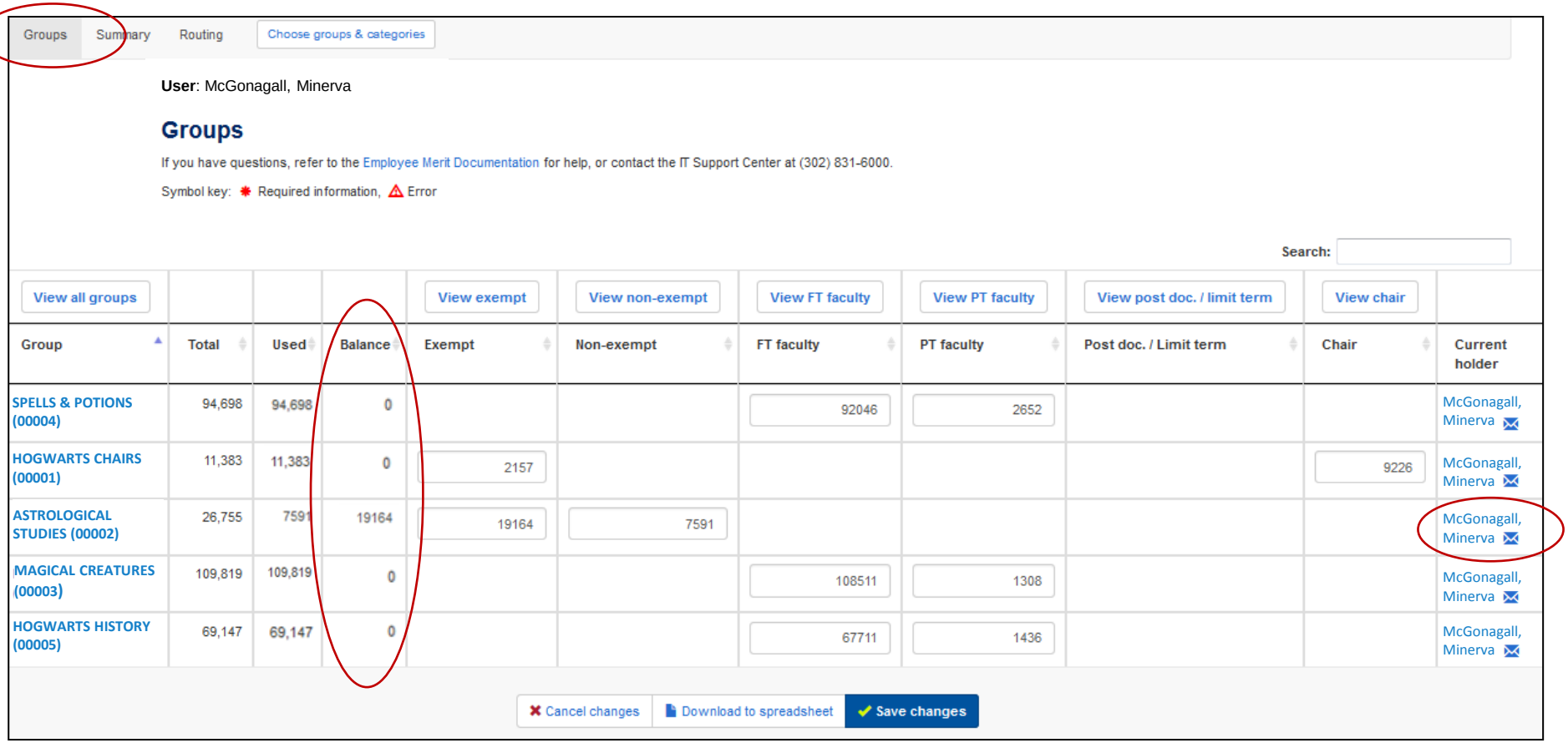
A system-generated email (with your comments) will be sent to anyone to whom you've routed EM Groups/Categories.



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.



Owner Checklist for Managing the EM Process: Step # 7 – Enter EM $

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 $"

ASTROLOGICAL STUDIES (00002)

Exempt

Show / hide columns

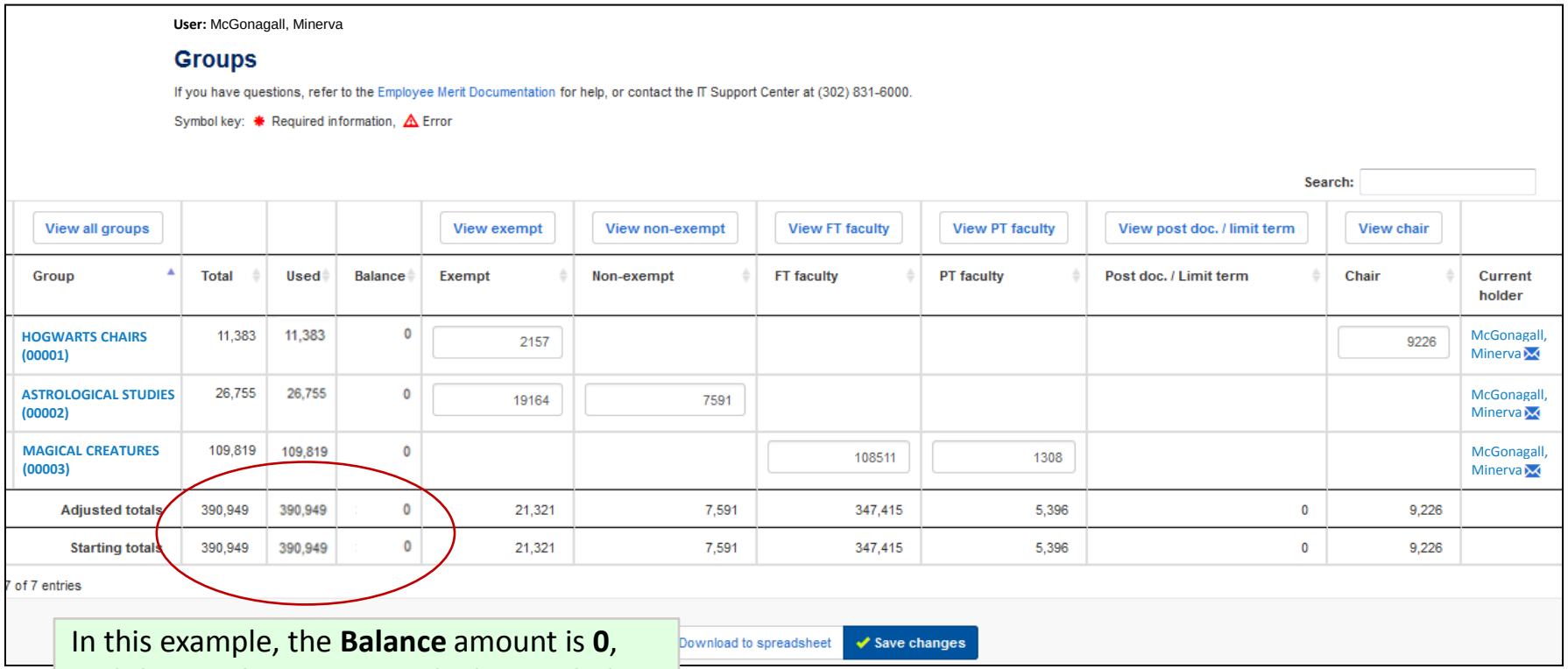
Information	Employee	Action	Rating	Old annual rate	Merit %	Merit increase	Structural increase	EM annual rate	JED increase	EM annual rate with JED
	Filch, Argus (800000001)	Remove employee from pool JED	4	54,948			0	54948		54,948
	Pomfrey, Poppy (800000013)	Remove employee from pool JED	4.7	54,107			0	54107		54,107
	Pince, Irma (800000027)	Remove employee from pool JED		80,000			0	80000		80,000
	Hagrid, Rubeus (800000999)	Remove employee from pool JED		158,097			0	158097		158,097

Cancel changes | Download to spreadsheet | Save changes

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.



User: McGonagall, Minerva

Groups

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

Symbol key: * Required information, ⚠ Error

Search:

View all groups				View exempt	View non-exempt	View FT faculty	View PT faculty	View post doc. / limit term	View chair	
Group	Total	Used	Balance	Exempt	Non-exempt	FT faculty	PT faculty	Post doc. / Limit term	Chair	Current holder
HOGWARTS CHAIRS (00001)	11,383	11,383	0	2157					9226	McGonagall, Minerva
ASTROLOGICAL STUDIES (00002)	26,755	26,755	0	19164	7591					McGonagall, Minerva
MAGICAL CREATURES (00003)	109,819	109,819	0			108511	1308			McGonagall, Minerva
Adjusted totals	390,949	390,949	0	21,321	7,591	347,415	5,396	0	9,226	
Starting totals	390,949	390,949	0	21,321	7,591	347,415	5,396	0	9,226	

7 of 7 entries

Download to spreadsheet | Save changes

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.

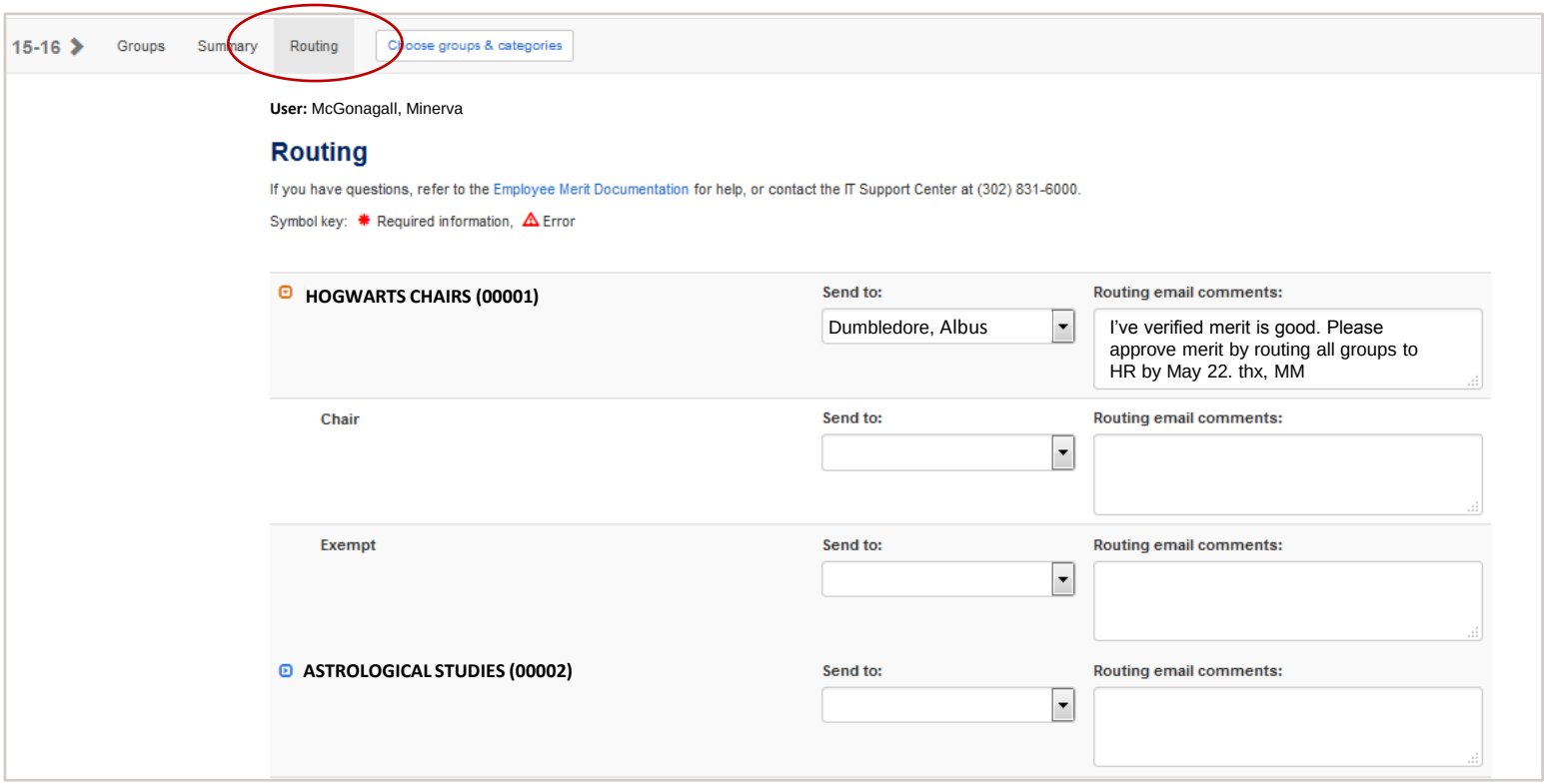
Owner Checklist for Managing the EM Process: Step # 9 – Route to Final Approver

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

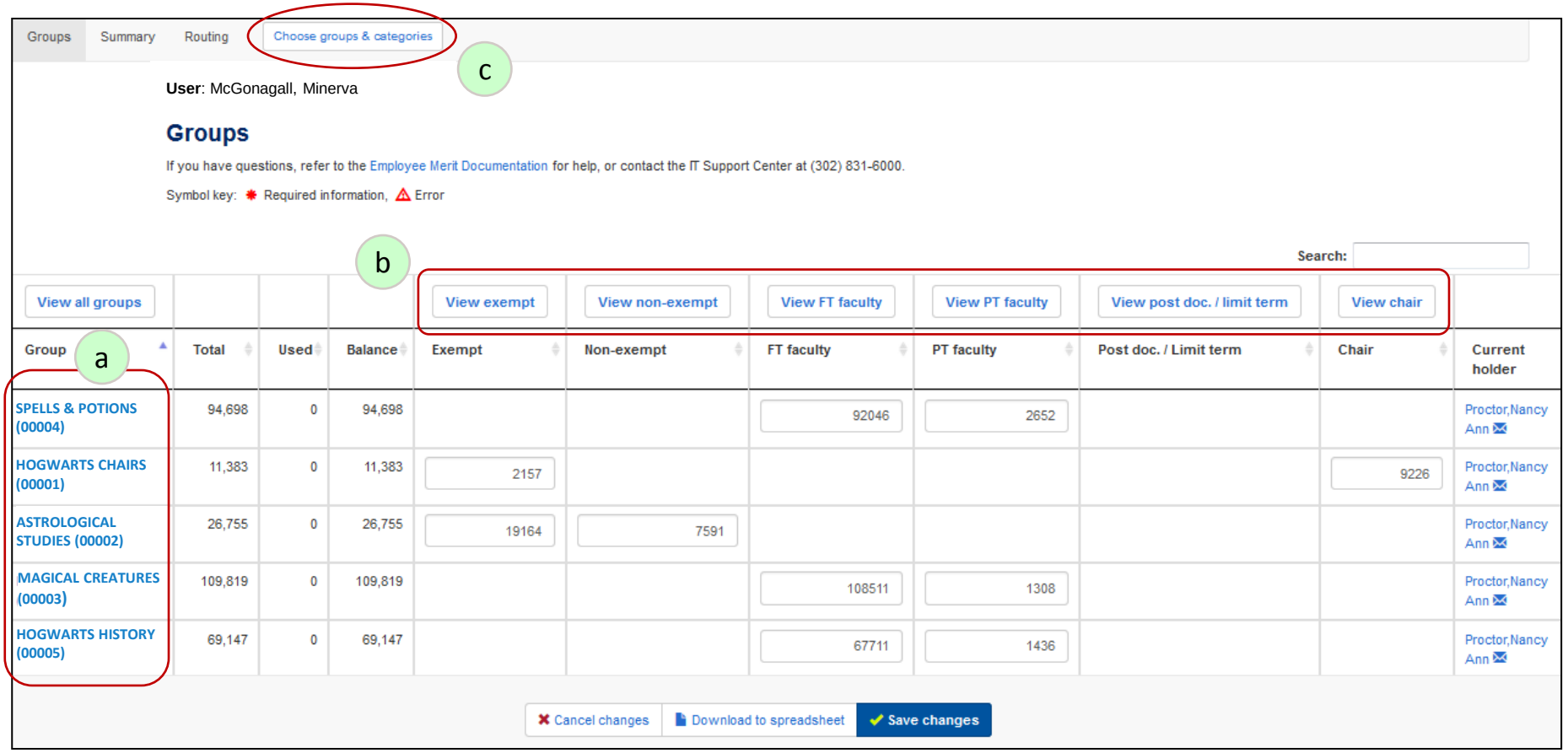
Groups page:

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

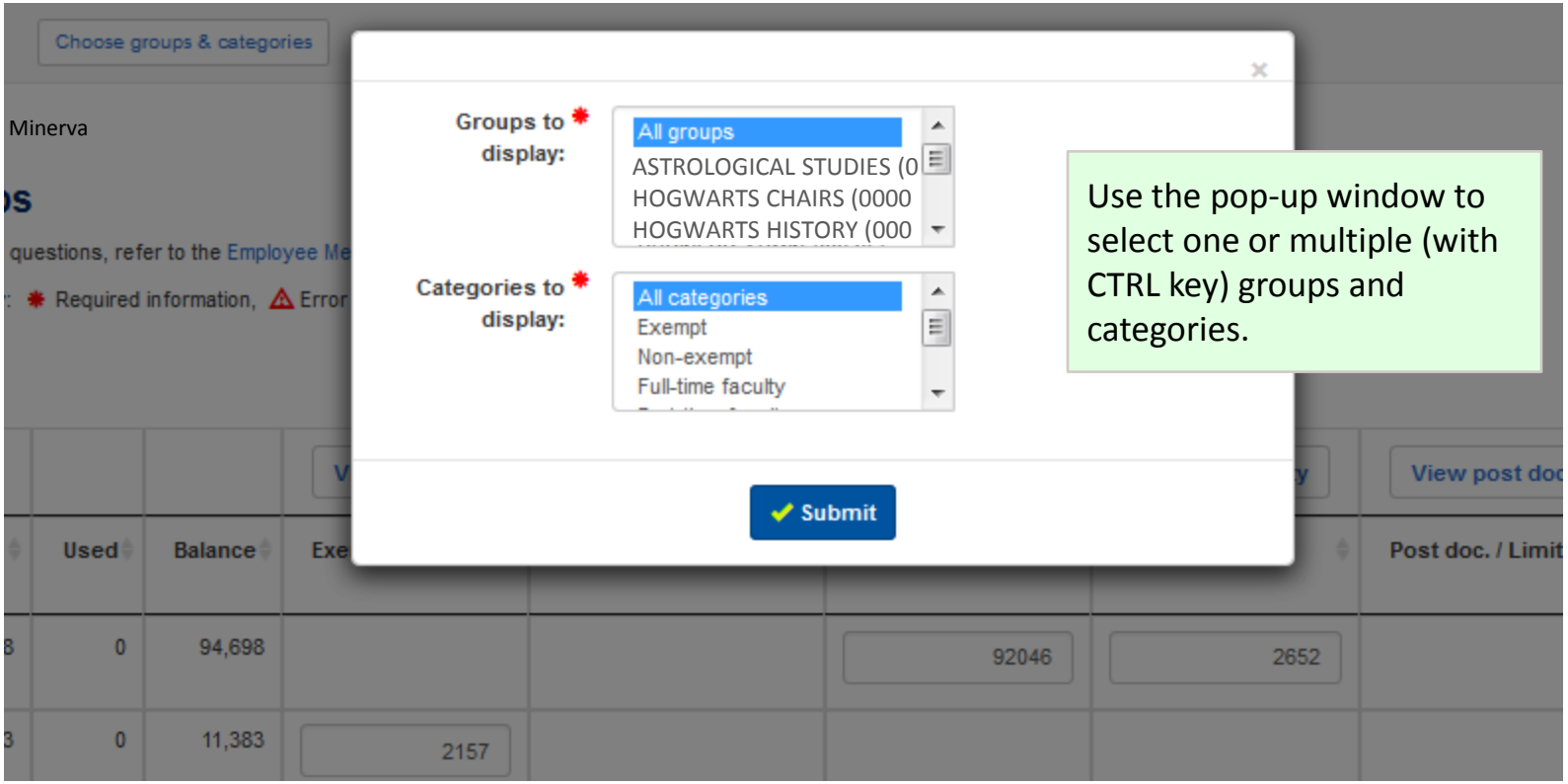
b. Click one of the **Category** buttons to select one category of employees for all groups

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.

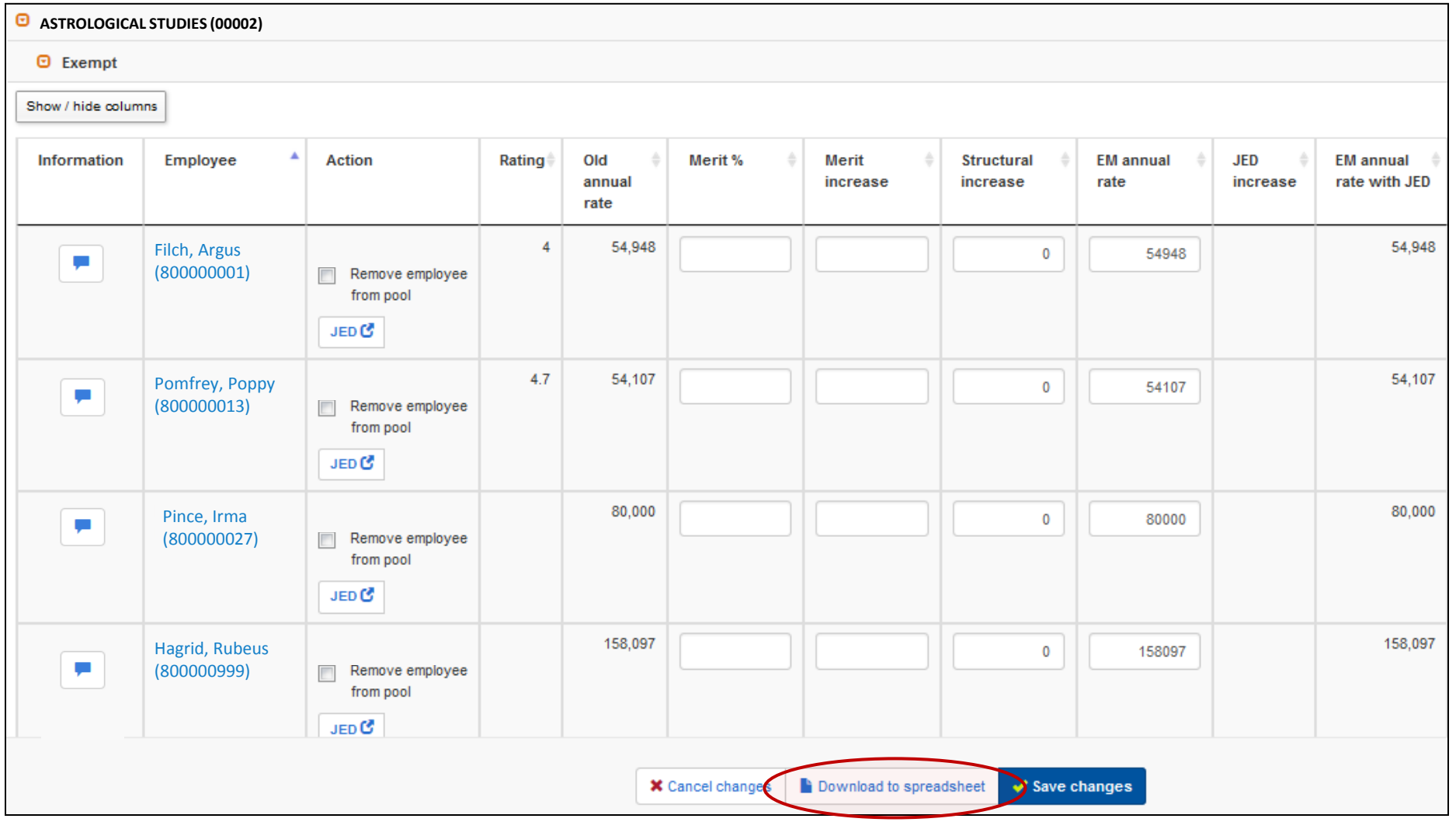


Note: To reset to all Groups/Categories again, select **All groups** and **All categories** in this pop-up window.

Owner/Editor Steps for Entering EM $: Step #2 – Downloading to Excel

Summary page

Consider **downloading to Excel** to try different scenarios, prior to making entries in the EM System.



ASTROLOGICAL STUDIES (00002)

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Show / hide columns

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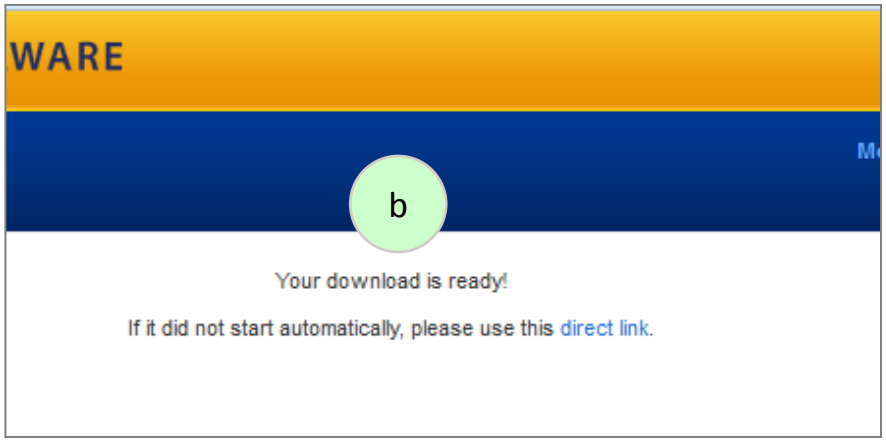
	Hagrid, Rubeus (800000999)	Remove employee from pool JED		158,097			0	158097		158,097

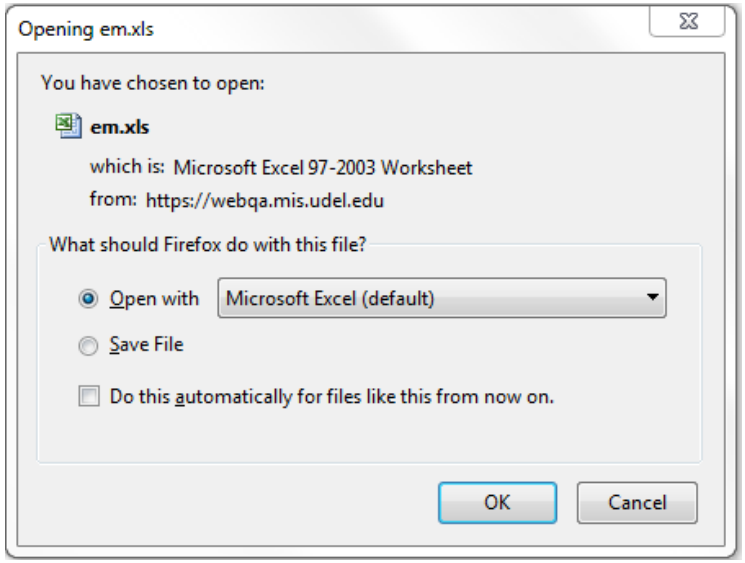
Cancel changes | Download to spreadsheet | Save changes

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).



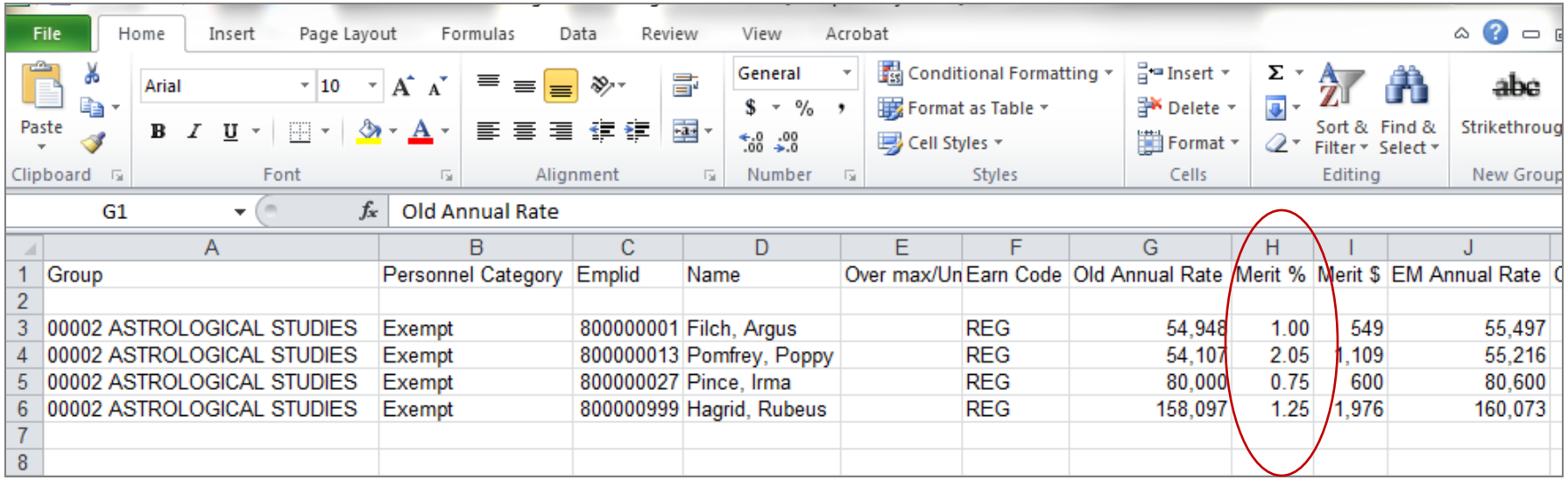
c



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.)



	A	B	C	D	E	F	G	H	I	J
1	Group	Personnel Category	Emplid	Name	Over max/Un	Earn Code	Old Annual Rate	Merit %	Merit $	EM Annual Rate
2										
3	00002 ASTROLOGICAL STUDIES	Exempt	800000001	Filch, Argus		REG	54,948	1.00	549	55,497
4	00002 ASTROLOGICAL STUDIES	Exempt	800000013	Pomfrey, Poppy		REG	54,107	2.05	1,109	55,216
5	00002 ASTROLOGICAL STUDIES	Exempt	800000027	Pince, Irma		REG	80,000	0.75	600	80,600
6	00002 ASTROLOGICAL STUDIES	Exempt	800000999	Hagrid, Rubeus		REG	158,097	1.25	1,976	160,073
7										
8										

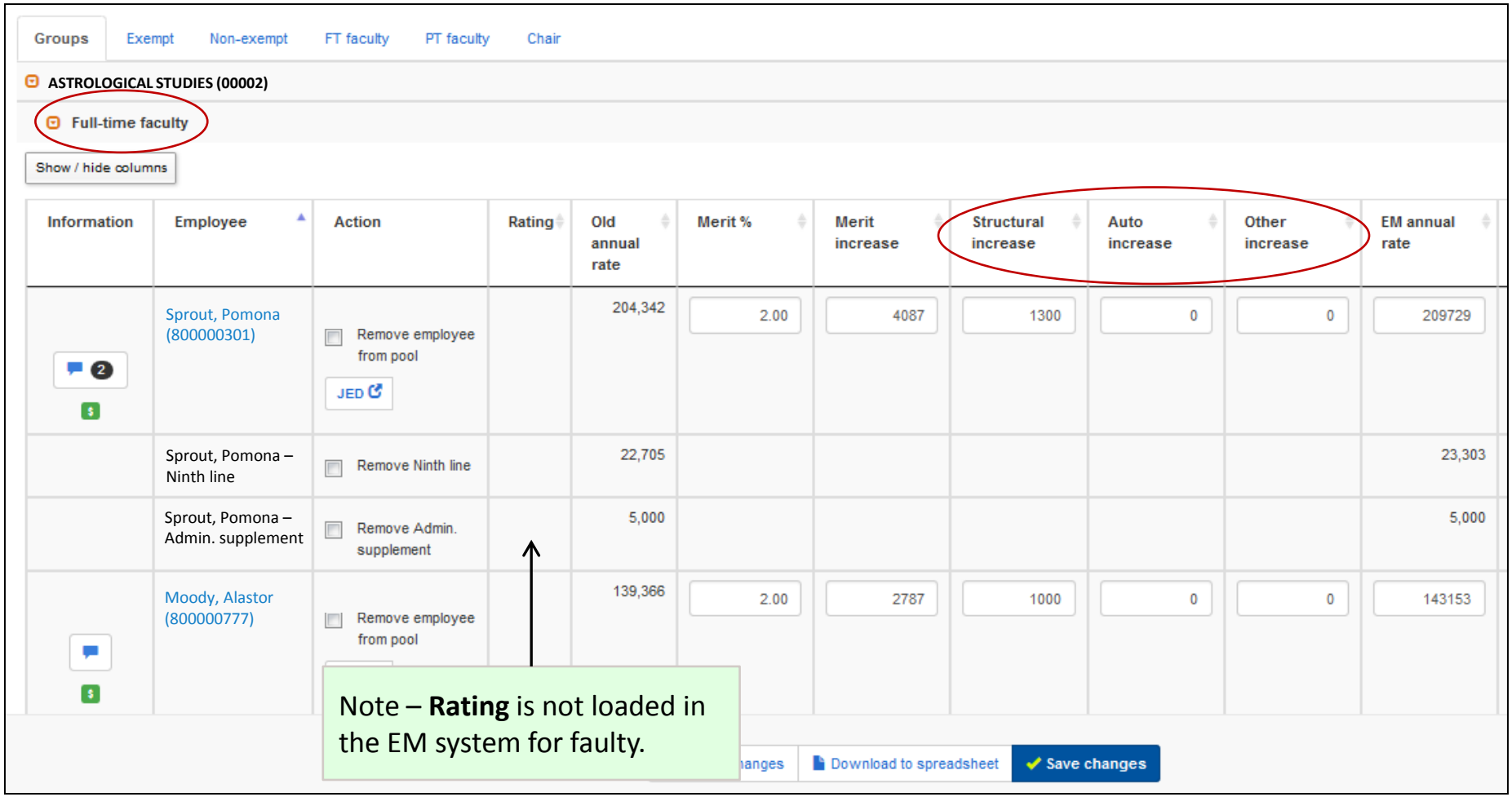
Two reasons to download EM data to Excel:

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

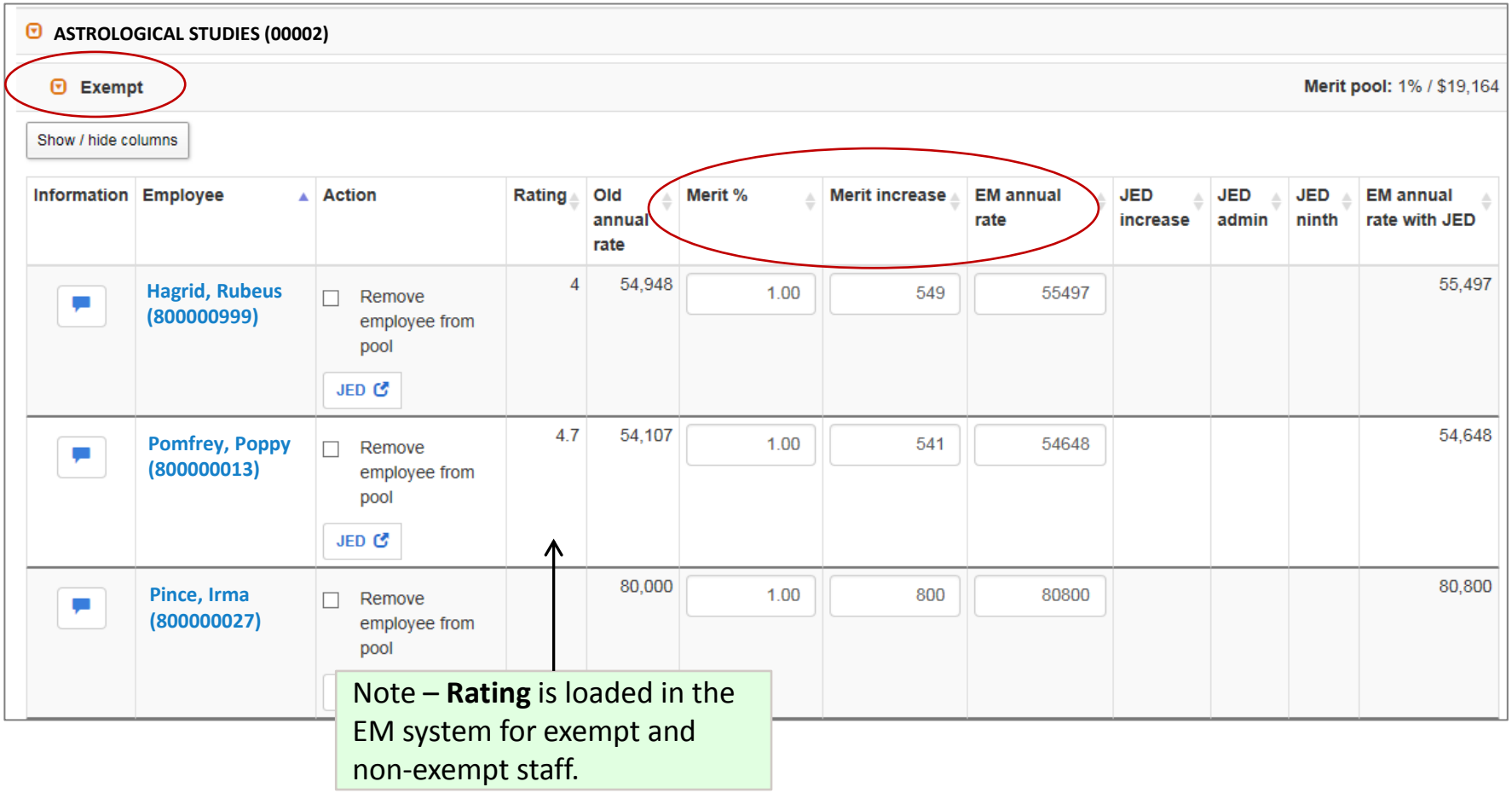
Summary page is programmed to display only the applicable columns for each **Category type.**

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



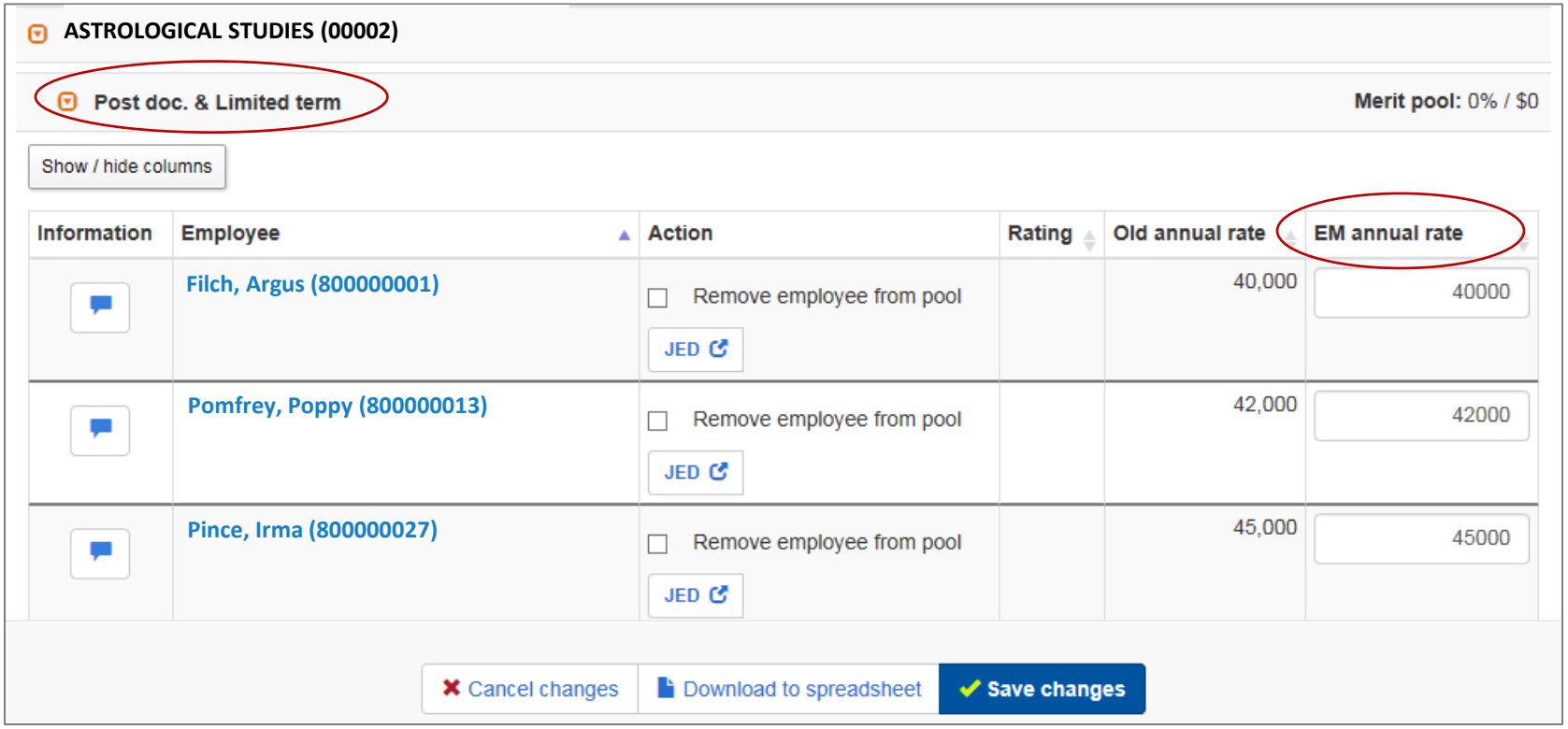
Owner/Editor Steps for Entering EM $: Step #3 – Exempt/Non-Exp entry page

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



Owner/Editor Steps for Entering EM $: Step #3 – Post Docs/Lim. Term entry page

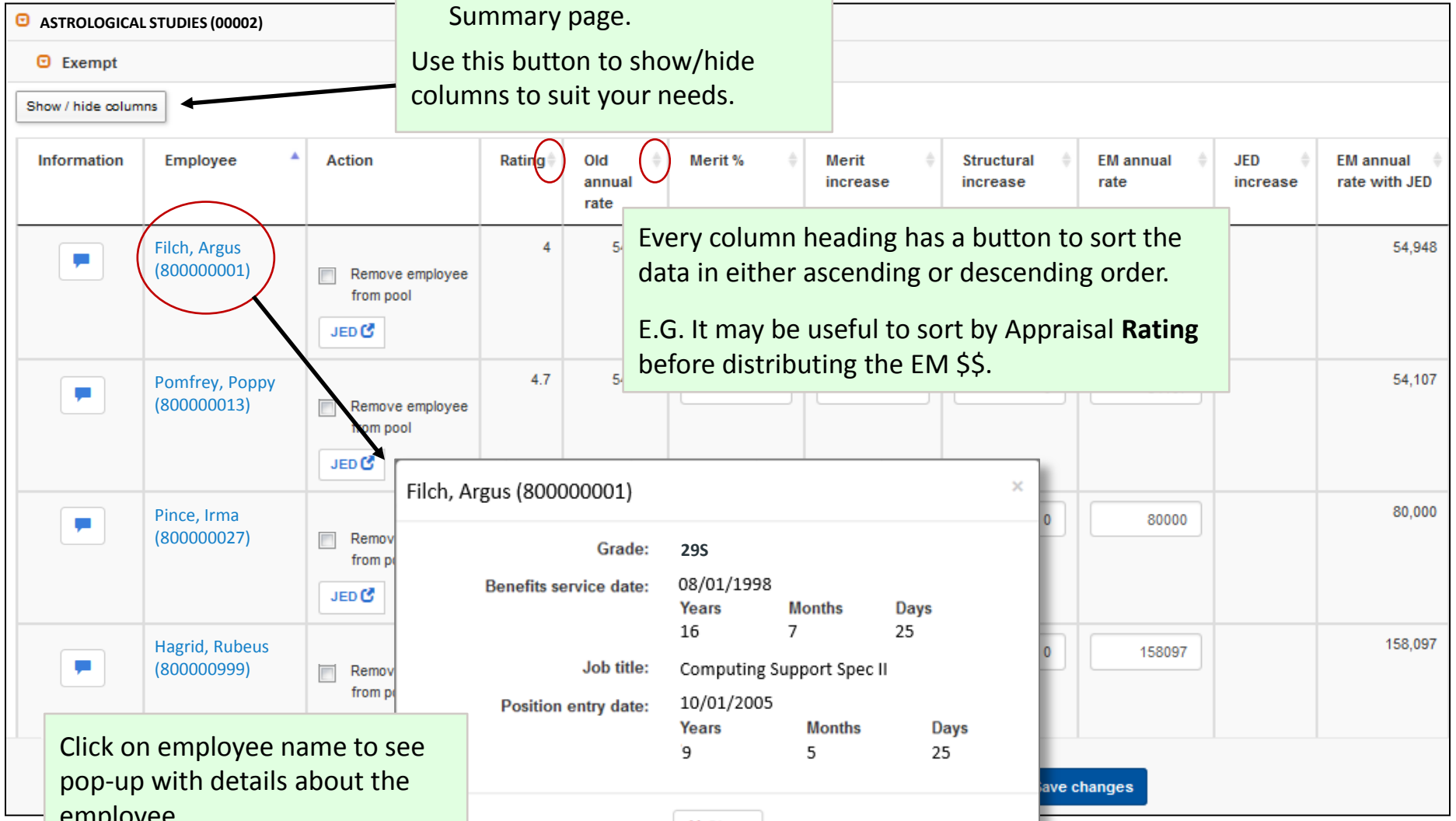
Post doc. & Limited term page only has one input columns for **EM annual rate,** since this Category does not get EM increases.



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.

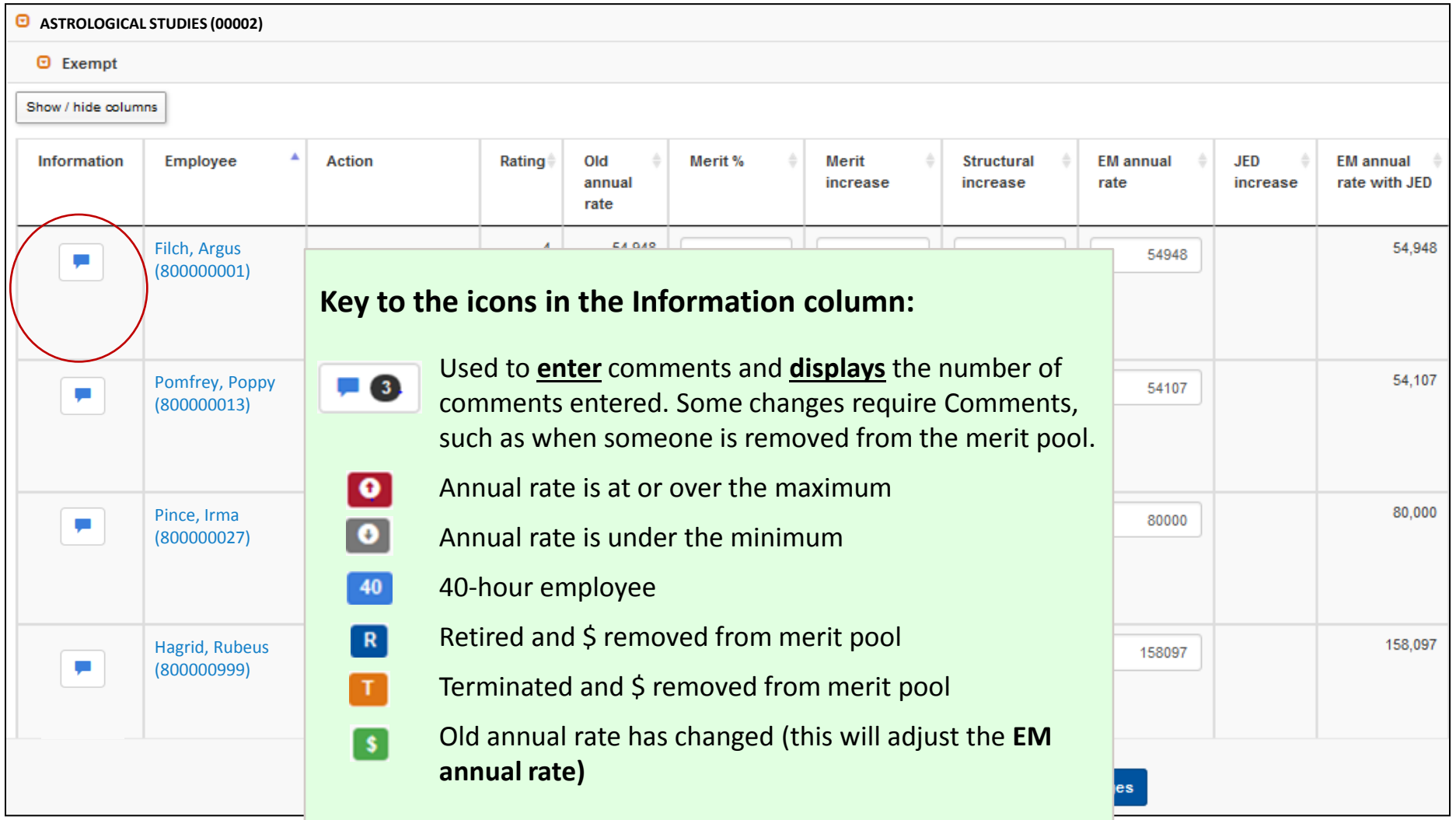


Every column heading has a button to sort the data in either ascending or descending order.

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



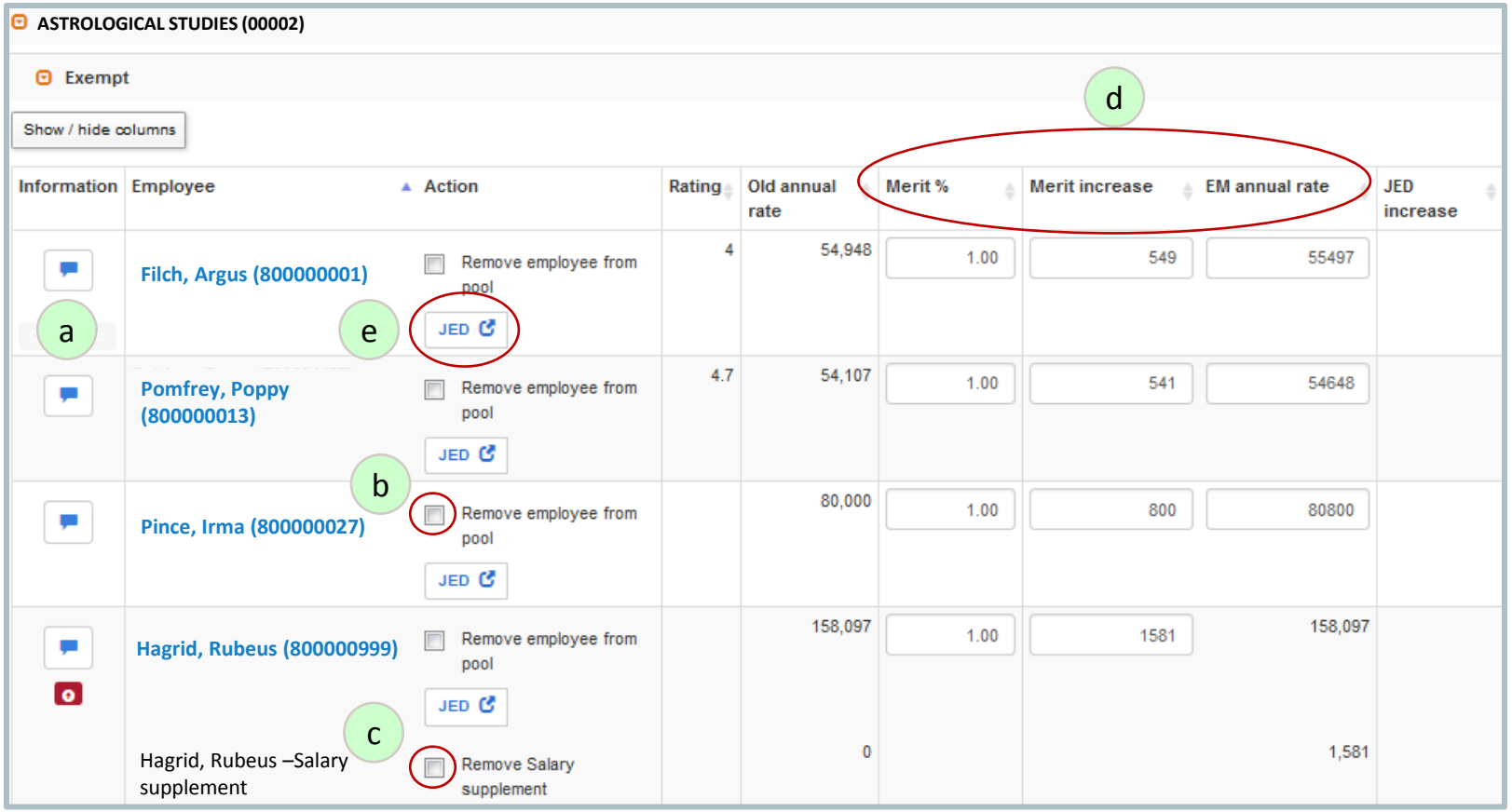
Key to the icons in the Information column:

- 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

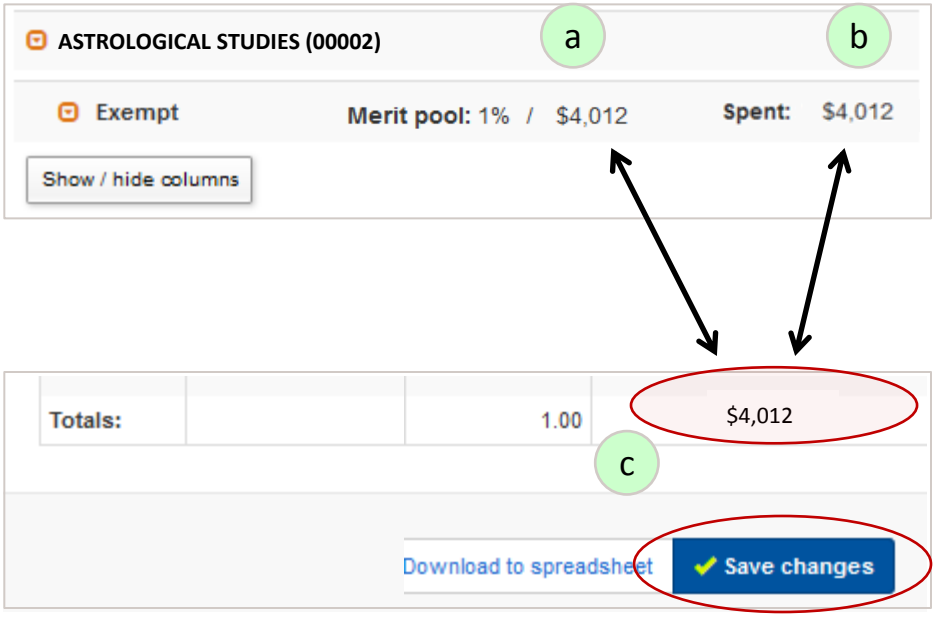
a. Check **Information** for retiring R or terminated T employees: remove from the pool if person is leaving prior to 7/1 or 9/1 (for fiscal and academic year employees, respectively).
b. Remove from pool: anyone with negotiated salary or moving to non-benefited position
c. Check Ninths and Salary supplements: 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)

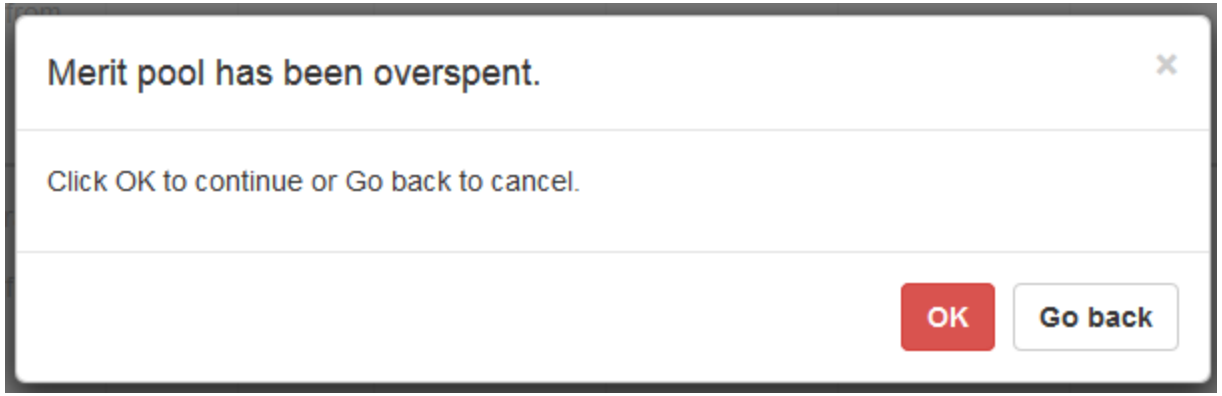
The *bottom left-hand* corner of the Group Category shows **Totals:** $ Merit Increase (c). This total will match the **Spent $** (b) amount.

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.

Owner/Editor Steps for Entering 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.

Owner/Editor Steps for Entering EM $: Step #5 – Repeat process for add'l Groups

Group and Summary pages

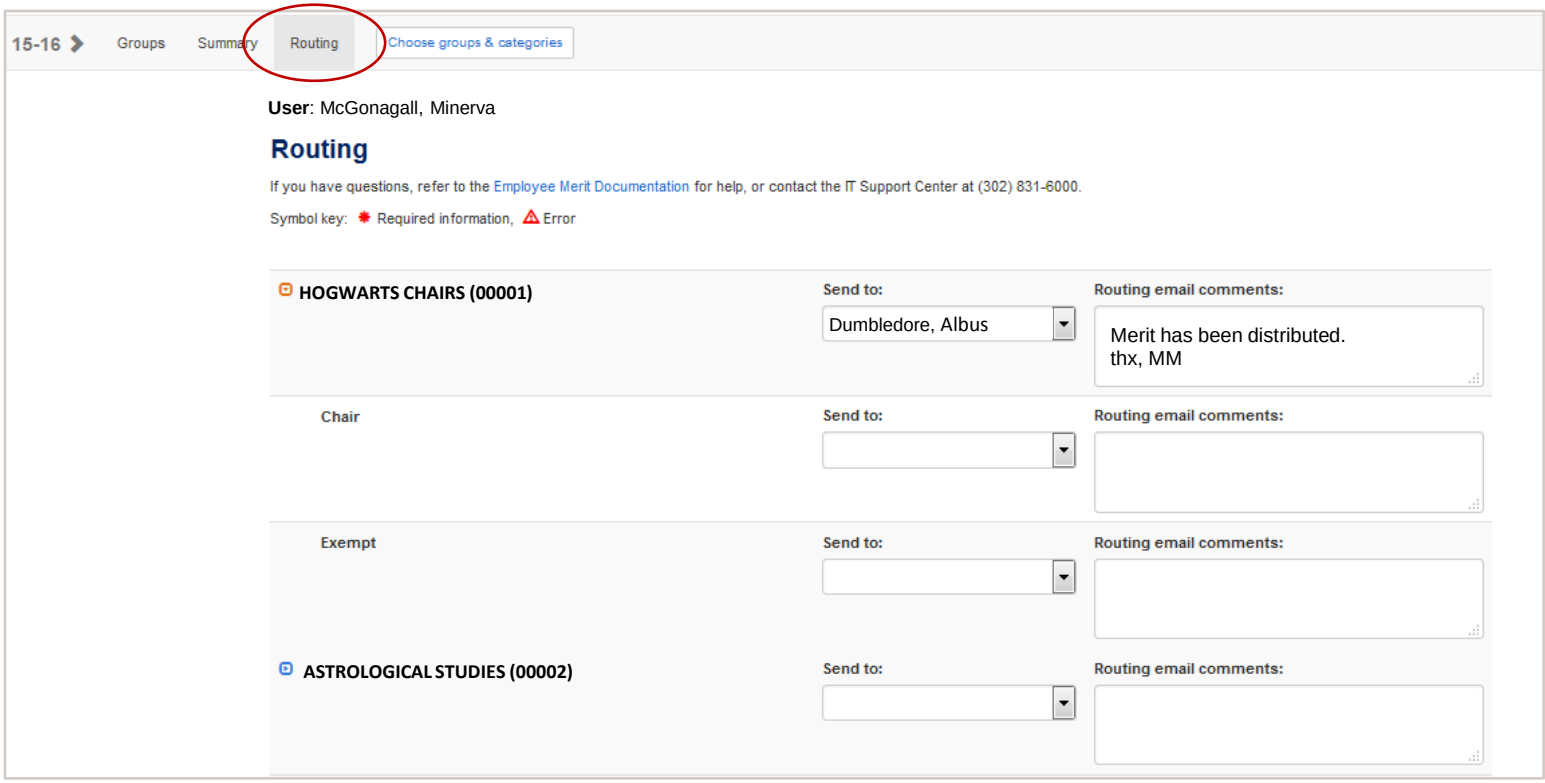
Repeat Steps 1-4 until all Groups/Categories have EM $ distributed.

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

University of Delaware | connectingU to learn • to lead • to succeed