

# 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](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 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](http://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

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

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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

**Employee Merit**

User: McGonagall, Minerva

### Menu

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

**Current**

- [15-16 Employee Merit Increase](#)

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

**Previous**

- [14-15 Employee Merit Increase](#) CLOSED
- [12-13 Employee Merit Increase](#)
- [12-13 Employee Merit Increase](#) CLOSED



# 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.

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

# 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.

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 type="checkbox"/> HOGWARTS CHAIRS (00001)	1	Send to: <input type="text" value=""/>	Routing email comments: <input type="text"/>
Chair	2	Send to: <input type="text" value=""/>	Routing email comments: <input type="text"/>
Exempt	2	Send to: <input type="text" value=""/>	Routing email comments: <input type="text"/>

# 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.

Groups Summary Routing [Choose groups & categories](#)

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:

Group ▲	Total	Used	Balance	Exempt	Non-exempt	FT faculty	PT faculty	Post doc. / Limit term	Chair	Current holder
<a href="#">View all groups</a>				<a href="#">View exempt</a>	<a href="#">View non-exempt</a>	<a href="#">View FT faculty</a>	<a href="#">View PT faculty</a>	<a href="#">View post doc. / limit term</a>	<a href="#">View chair</a>	
SPELLS & POTIONS (00004)	94,698	94,698	0			92046	2652			McGonagall, Minerva <a href="#">✉</a>
HOGWARTS CHAIRS (00001)	11,383	11,383	0	2157					9226	McGonagall, Minerva <a href="#">✉</a>
ASTROLOGICAL STUDIES (00002)	26,755	7591	19164	19164	7591					McGonagall, Minerva <a href="#">✉</a>
MAGICAL CREATURES (00003)	109,819	109,819	0			108511	1308			McGonagall, Minerva <a href="#">✉</a>
HOGWARTS HISTORY (00005)	69,147	69,147	0			67711	1436			McGonagall, Minerva <a href="#">✉</a>

[✖ Cancel changes](#) [📄 Download to spreadsheet](#) [✔ Save changes](#)





# 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)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4	54,948	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="54948"/>		54,948
	Pomfrey, Poppy (800000013)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4.7	54,107	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="54107"/>		54,107
	Pince, Irma (800000027)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>		80,000	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="80000"/>		80,000
	Hagrid, Rubeus (800000999)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>		158,097	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="158097"/>		158,097

# 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:

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	<input type="text" value="2157"/>					<input type="text" value="9226"/>	McGonagall, Minerva
ASTROLOGICAL STUDIES (00002)	26,755	26,755	0	<input type="text" value="19164"/>	<input type="text" value="7591"/>					McGonagall, Minerva
MAGICAL CREATURES (00003)	109,819	109,819	0			<input type="text" value="108511"/>	<input type="text" value="1308"/>			McGonagall, Minerva
<b>Adjusted totals</b>	<b>390,949</b>	<b>390,949</b>	<b>0</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>390,949</b>	<b>0</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

[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.)

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: Dumbledore, Albus	Routing email comments: I've verified merit is good. Please approve merit by routing all groups to HR by May 22. thx, MM
Chair	Send to:	Routing email comments:
Exempt	Send to:	Routing email comments:
<input checked="" type="checkbox"/> ASTROLOGICAL STUDIES (00002)	Send to:	Routing email comments:

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:

- 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)

Groups Summary Routing **Choose groups & categories**

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:

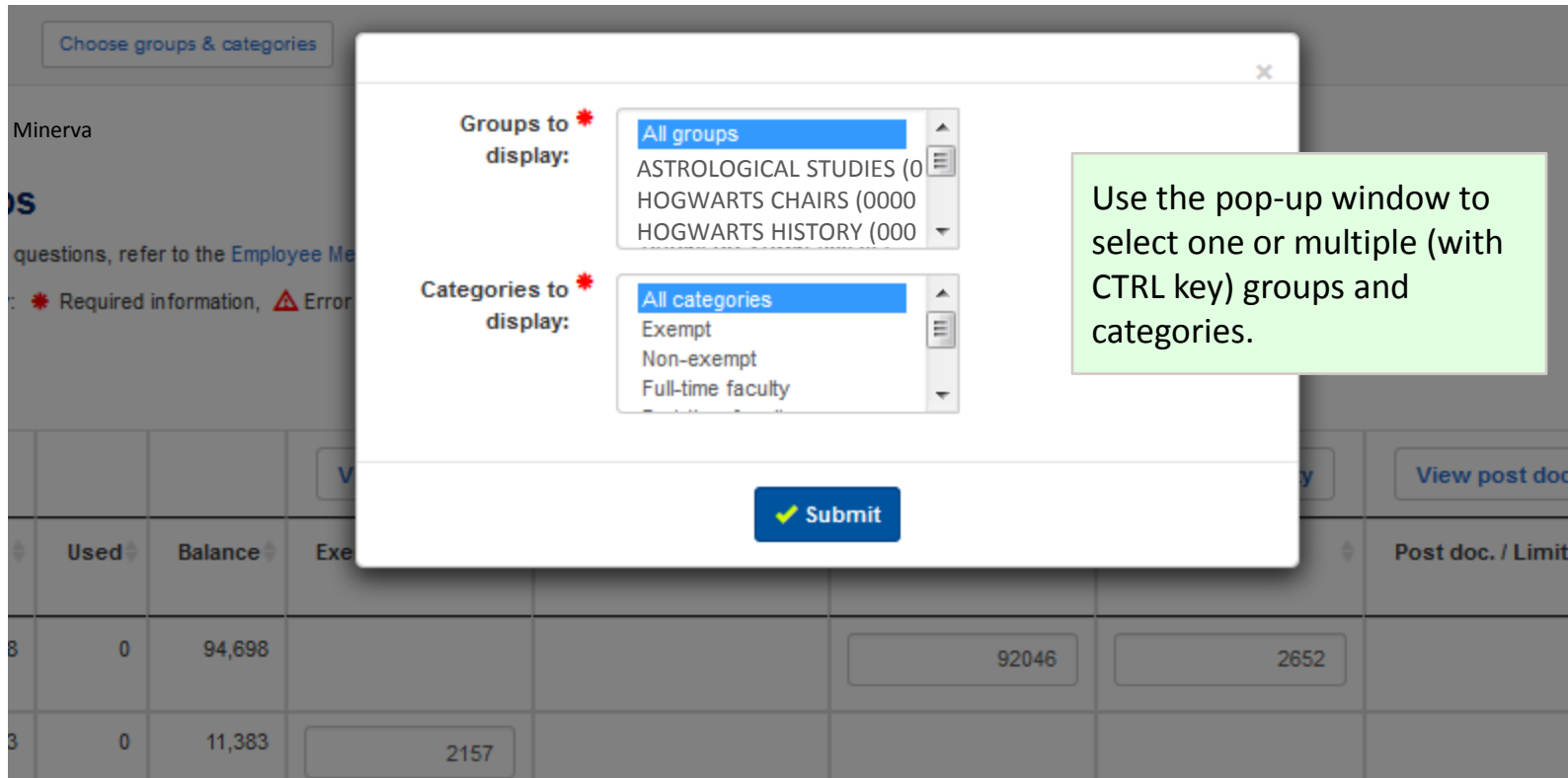
[View all groups](#)

[View exempt](#) [View non-exempt](#) [View FT faculty](#) [View PT faculty](#) [View post doc. / limit term](#) [View chair](#)

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

# 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.



The screenshot shows a software interface with a 'Choose groups & categories' button. A pop-up window is open, displaying two selection lists. The first list, 'Groups to display', has 'All groups' selected. The second list, 'Categories to display', has 'All categories' selected. A 'Submit' button is at the bottom of the pop-up. A green callout box on the right explains that the pop-up window is used to select one or multiple groups and categories using the CTRL key.

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.

# 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)

Exempt

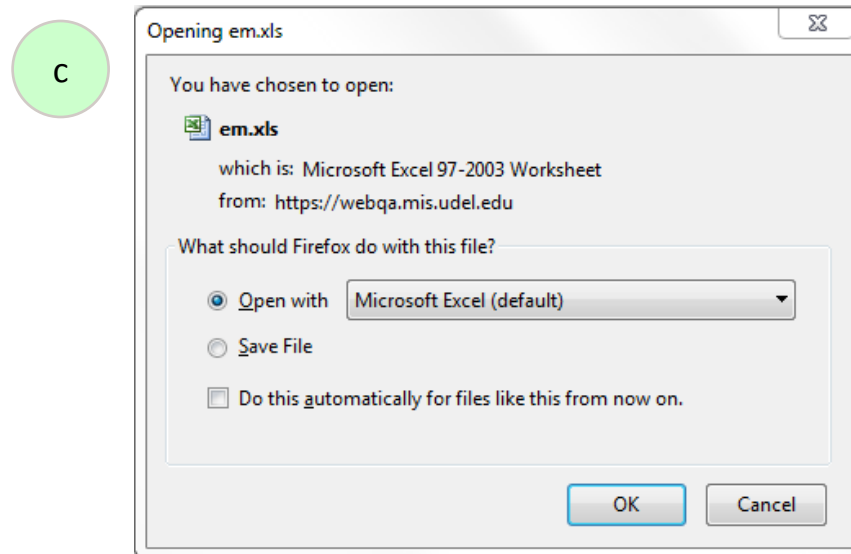
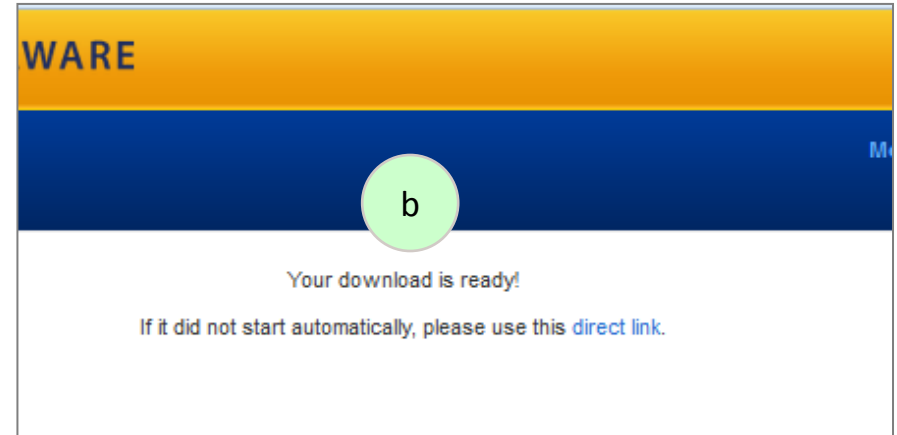
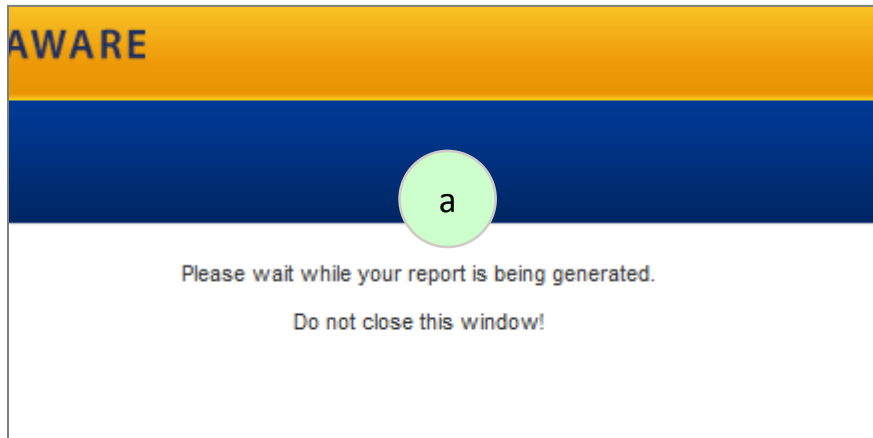
Show / hide columns

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	54,948	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="54948"/>		54,948
	Pomfrey, Poppy (800000013)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>	4.7	54,107	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="54107"/>		54,107
	Pince, Irma (800000027)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>		80,000	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="80000"/>		80,000
	Hagrid, Rubeus (800000999)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a>		158,097	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="158097"/>		158,097

[Cancel changes](#) [Download to spreadsheet](#) [Save changes](#)

## Owner/Editor Steps for Entering EM \$: **Step #2 – downloading to Excel**

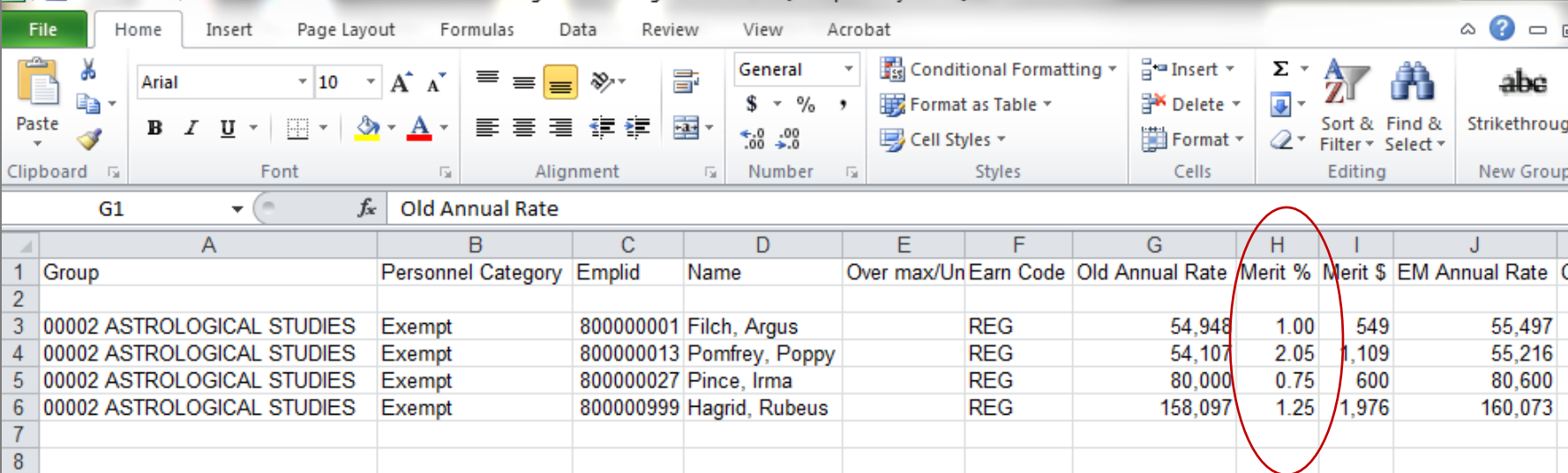
Downloading data to Excel will give you pop-up notifications when in progress (a), when successful (b), and with the Excel spreadsheet (c).



## 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.)



The screenshot shows an Excel spreadsheet with the following data:

	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.

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
 	<a href="#">Sprout, Pomona (800000301)</a>	<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"/>
 	<a href="#">Moody, Alastor (800000777)</a>	<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"/>

Note – Rating is not loaded in the EM system for faculty.

changes Download to spreadsheet Save changes

# 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.

ASTROLOGICAL STUDIES (00002)

**Exempt** Merit pool: 1% / \$19,164

Show / hide columns

Information	Employee	Action	Rating	Old annual rate	Merit %	Merit increase	EM annual rate	JED increase	JED admin	JED ninth	EM annual rate with JED
	<a href="#">Hagrid, Rubeus (800000999)</a>	<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"/>				55,497
	<a href="#">Pomfrey, Poppy (800000013)</a>	<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"/>				54,648
	<a href="#">Pince, Irma (800000027)</a>	<input type="checkbox"/> Remove employee from pool		80,000	<input type="text" value="1.00"/>	<input type="text" value="800"/>	<input type="text" value="80800"/>				80,800

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.

ASTROLOGICAL STUDIES (00002)

**Post doc. & Limited term** Merit pool: 0% / \$0

Show / hide columns

Information	Employee	Action	Rating	Old annual rate	EM annual rate
	Filch, Argus (800000001)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a> 		40,000	<input type="text" value="40000"/>
	Pomfrey, Poppy (800000013)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a> 		42,000	<input type="text" value="42000"/>
	Pince, Irma (800000027)	<input type="checkbox"/> Remove employee from pool <a href="#">JED</a> 		45,000	<input type="text" value="45000"/>

[✖ Cancel changes](#) [📄 Download to spreadsheet](#) [✔ Save changes](#)

# 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.



Show / hide columns

Filch, Argus (800000001)

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








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

# Owner/Editor Steps for Entering EM \$: **Step #3 – Information column icons**

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)			54,948				54948		54,948
	Pomfrey, Poppy (800000013)							54107		54,107
	Pince, Irma (800000027)							80000		80,000
	Hagrid, Rubeus (800000999)							158097		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**)

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**

- 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).
- Remove from pool: anyone with negotiated salary or moving to non-benefited position
- Check NINTHS and Salary supplements: use checkboxes to remove as needed
- Enter EM by: **Merit %**, **Merit Increase** or **EM annual rate**
- Look for situations that require Employee Merit JEDs: Chair ↔ Faculty, Career Ladder Promotions, Faculty Promotions

ASTROLOGICAL STUDIES (00002)

Exempt

Show / hide columns

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

# Owner/Editor Steps for Entering EM \$: **Step #4 – Verify Merit Totals**

## Summary page

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

The screenshot shows a summary page for 'ASTROLOGICAL STUDIES (00002)'. It features a table with the following data:

ASTROLOGICAL STUDIES (00002)		a	b
Exempt	Merit pool: 1% / \$4,012		Spent: \$4,012

Below the table, there is a 'Totals' row in a table:

Totals:		1.00	\$4,012
---------	--	------	---------

At the bottom, there are two buttons: 'Download to spreadsheet' and 'Save changes'.

Callouts: 'a' points to the Merit Pool amount (\$4,012), 'b' points to the Spent amount (\$4,012), and 'c' points to the Totals amount (\$4,012).

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

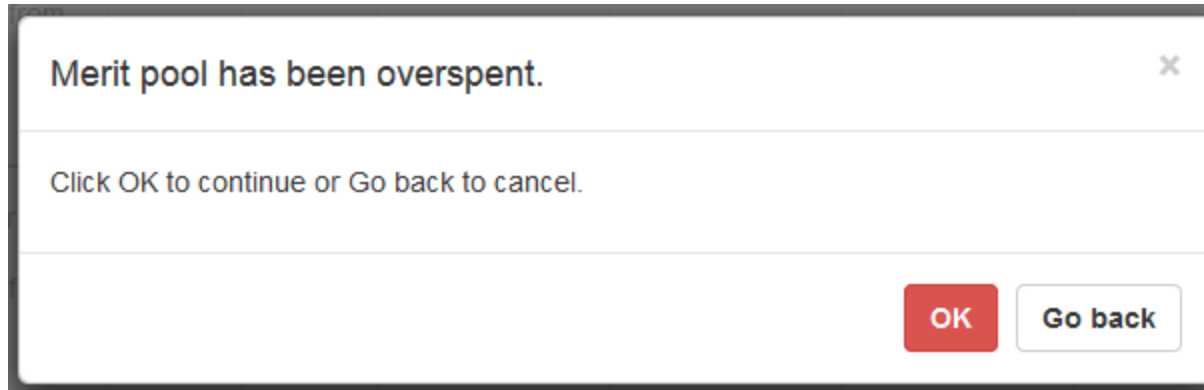
The *bottom left-hand* corner of the Group Category shows **Totals: \$ Merit Increase (c)**. This total will match the **Spent \$ (b)** amount.

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.

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: Dumbledore, Albus	Routing email comments: Merit has been distributed. thx, MM
Chair	Send to:	Routing email comments:
Exempt	Send to:	Routing email comments:
<input checked="" type="checkbox"/> ASTROLOGICAL STUDIES (00002)	Send to:	Routing email comments:

# 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)