

## Owner/Editor – Entering Merit CHECKLIST

1. Groups page – select which Groups/Categories to work with
2. Summary page - consider downloading data to Excel to try different scenarios
  - May also download from the Groups page
3. Summary page - for each employee in selected Group/Category:
  - Remove these employees from the pool:
    - Retiring or terminated on or before the effective date of merit increase
    - Anyone with a negotiated salary
    - Anyone moving to a non-benefited position
  - 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 money distributed
6. Editor – Route Groups/Categories to Owner once completed