Employee Merit System
Overview

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 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
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**
  - 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
1. Read **Information** about current year’s Employee Merit

HR sends an email to alert users the EM System is released.

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

Select **current link** to enter this year’s merit increases
Or view a **previous** year
Groups Page
**Navigation to Groups, Summary and Routing pages**

**Groups** – Owners/Editors use to move money between groups, view $ available and spent, also to view, sort or filter your EM Groups

**Summary** – Owners/Editors use to enter EM information

**Routing** – Owners/Editors use to distribute EM groups/categories to others with EM access
**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.

This column shows all your EM Groups.
Reminder: Merit Pool amounts can be redistributed among the same personnel category.

These are the Merit Pool dollars per category:
- **Total** – Total Merit Pool for each Group
- **Used** – Merit distributed
- **Balance** – Difference between what was available and what was 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.)
The bottom of the page displays the merit pool totals for all the Groups/Categories.

Use these numbers to ensure the Merit Amount is not overspent.

<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>
<th>Current holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOGWARTS CHAIRS (00001)</td>
<td>11,383</td>
<td>0</td>
<td>11,383</td>
<td></td>
<td>2157</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASTROLOGICAL STUDIES (00002)</td>
<td>26,755</td>
<td>0</td>
<td>26,755</td>
<td></td>
<td>19154</td>
<td></td>
<td></td>
<td>7591</td>
<td></td>
<td></td>
</tr>
<tr>
<td>MAGICAL CREATURES (00003)</td>
<td>109,819</td>
<td>0</td>
<td>109,819</td>
<td></td>
<td></td>
<td>103511</td>
<td>1308</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Adjusted total**: 390,949

**Starting total**: 390,949

User: McGonagall, Minerva

Symbol key: Required Information, Error
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.
Sort buttons:
Every column heading has a button to sort the data in either ascending or descending order.
<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>
<th>Current holder</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPELLS &amp; POTIONS (00004)</td>
<td>94,698</td>
<td>0</td>
<td>94,698</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>HOGWARTS CHAIRS (00001)</td>
<td>11,383</td>
<td>0</td>
<td>11,383</td>
<td></td>
<td></td>
<td>2157</td>
<td></td>
<td></td>
<td>2256</td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>ASTROLOGICAL STUDIES (00002)</td>
<td>26,755</td>
<td>0</td>
<td>26,755</td>
<td></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>19511</td>
<td>1383</td>
<td></td>
<td>McGonagall, Minerva</td>
</tr>
<tr>
<td>HOGWARTS HISTORY (00005)</td>
<td>89,147</td>
<td>0</td>
<td>89,147</td>
<td></td>
<td></td>
<td>67711</td>
<td>1436</td>
<td></td>
<td></td>
<td>McGonagall, Minerva</td>
</tr>
</tbody>
</table>

Current holder:
- Shows where a group currently sits
- Email can be sent to current holder

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

a. Click on **View All Groups** or 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)
Choose groups & categories button allows you to customize your selection by both Group and Category.

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.
This page displays Groups/Categories based on your filters or others choices.

Use the expand button to work on a category of employees.

<table>
<thead>
<tr>
<th>Groups</th>
<th>Exempt</th>
<th>Non-exempt</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASTROLOGICAL STUDIES (00002)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exempt</td>
<td>Merit pool: 1% / $19,164</td>
<td>Spent: $0</td>
</tr>
<tr>
<td>Non-exempt</td>
<td>Merit pool: 1% / $7,591</td>
<td>Spent: $0</td>
</tr>
</tbody>
</table>

The Merit pool %, $, and Spent display for each category.
### Summary page
Consider **downloading to Excel** to work with the information in excel and/or to draft different scenarios.

![Excel spreadsheet](image)

**ASTROLOGICAL STUDIES (00002)**

**Exempt**  
**Merit pool:** 1% / $4,012  
**Spent:** $0

<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>Filch, Argus (800000001)</td>
<td>▶️</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>Pomfrey, Poppy (800000013)</td>
<td>▶️</td>
<td>□ Remove employee from pool</td>
<td>4.7</td>
<td>54,107</td>
<td></td>
<td></td>
<td></td>
<td>54,107</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pince, Irma (800000027)</td>
<td>▶️</td>
<td>□ Remove employee from pool</td>
<td></td>
<td>80,000</td>
<td></td>
<td></td>
<td></td>
<td>80,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hagrid, Rubeus (800000999)</td>
<td>▶️</td>
<td>□ Remove employee from pool</td>
<td></td>
<td>158,097</td>
<td></td>
<td></td>
<td></td>
<td>158,097</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Downloading data to Excel will give you pop-up notifications when in progress (a), when successful (b), and with the Excel spreadsheet (c).
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.)
**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.
Post doc. & Limited term category only has one input column for EM annual rate, as this Category does not have a merit pool.
<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>Remove employee from pool</td>
<td>4</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pomfrey, Poppy (800000013)</td>
<td>Remove employee from pool</td>
<td>4.7</td>
<td>5</td>
<td></td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Column headings 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.
### 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)**
a. Check **Information** for retiring or terminated employees: remove from the pool
   (For more details about **Information**, see PDF called “EM - Key for Information Icons”)
b. Remove from pool: anyone with negotiated salary, moving to non-benefited position, terminating/retiring on or before the effective date of their merit increase
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

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**ASTROLOGICAL STUDIES (00002)**

<table>
<thead>
<tr>
<th>Exempt</th>
<th>Merit pool: 1% / $4,012</th>
<th>Spent: $0</th>
</tr>
</thead>
</table>

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<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>EM annual rate</th>
<th>JED increase</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Filch, Argus (800000001)</td>
<td>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>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>Remove employee from pool</td>
<td></td>
<td>80,000</td>
<td>1.00</td>
<td>806</td>
<td>80800</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus (800000999)</td>
<td>Remove employee from pool</td>
<td></td>
<td>158,097</td>
<td>1.00</td>
<td>1581</td>
<td>158097</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hagrid, Rubeus -Salary supplement</td>
<td>Remove Salary supplement</td>
<td>0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,581</td>
</tr>
</tbody>
</table>
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.
Verify EM pool total is not overspent; adjust as needed

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

These numbers should match or the **Spent (b) & Totals (c) number should be less than the Merit Pool $ (a).**

If the **Spent (b) & Totals (c) number is more than Merit Pool $ (a), this means you have overspent the pool.**

Click the **Save changes** button when you’re done.

The **bottom left-hand** corner of the Group Category shows **Totals: $ Merit Increase (c).** This total would match the **Spent (b) information.**
If the **Spent $ & Totals** number is more than **Merit Pool $**, this means you have overspent the pool.

You will receive a pop-up notification when saving alerting you that you have overspent your pool. This is informational and does not prevent the information from saving.
Contract Changer
• Update faculty contract information as needed (Group/Category must be routed to you)
• If you have additional roles, the full EM Summary Screen will display and/or be editable
• Click **Save changes** button when finished
Routing Page
EM Groups/Categories can be routed people to edit. The **Send to** dropdown includes those with **Owner, Editor, Contract Changer, and Approver** access for that Group.

The whole Group (1) or specific Categories (2) in the Group can be routed.

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 you’ve routed EM Groups/Categories. Final Approver routes EM Screens to HR Office no later than the posted deadline.
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