

Approving Merit Increases

The following instructions will guide the approver through the Merit Worksheet approval process.

1. Login to the **Fusion Merit Tool** using your UTHealth credentials to review notification(s) submitted by your manager(s): go.uth.edu/fusion
 - You will also receive an Outlook email notification that you have merit recommendation submissions from your managers.



UTHealth
The University of Texas
Health Science Center at Houston

Protected Resource

The resource you are requesting requires authentication.

Use your UTHealth username and password

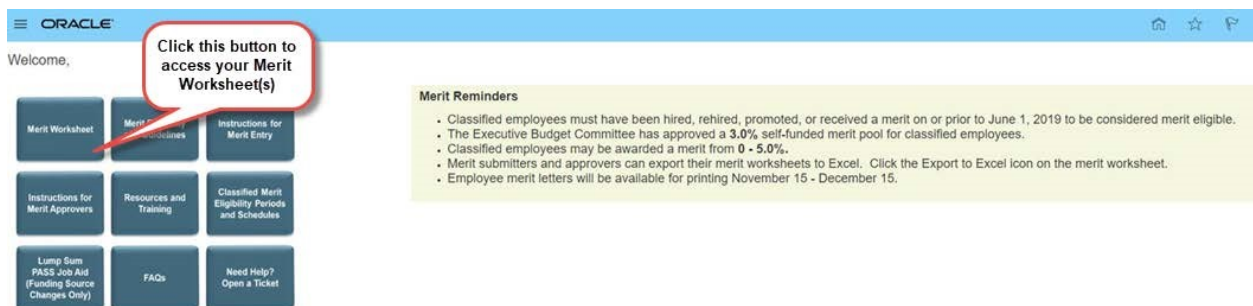
UTHealth Enterprise Password

Username

Password

Log in

2. To access your merit plan worksheet:
 - a. Click the **Merit Worksheet** button on the left side of the screen to access your merit worksheet(s).



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Welcome,

Click this button to access your Merit Worksheet(s)

Merit Worksheet

Merit Worksheet

Instructions for Merit Entry

Instructions for Merit Approvers

Resources and Training

Classified Merit Eligibility Periods and Schedules

Lump Sum PASS Job Aid (Funding Source Changes Only)

FAQs

Need Help? Open a Ticket

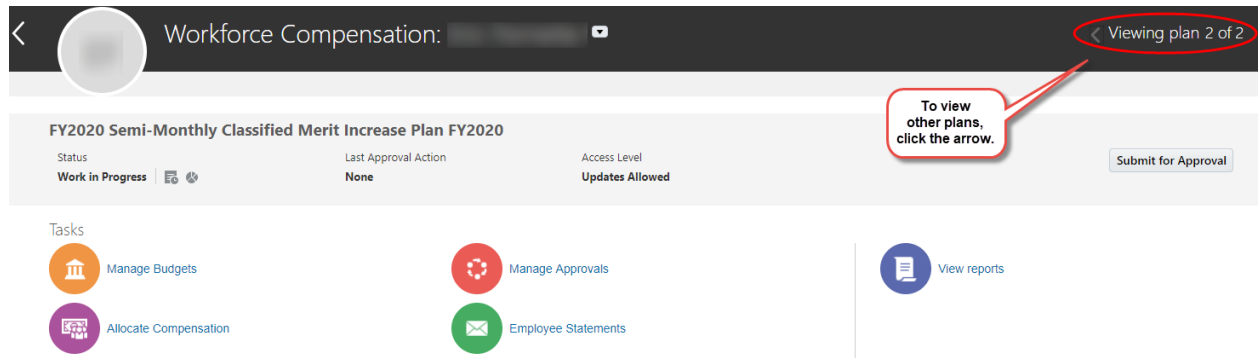
Merit Reminders

- Classified employees must have been hired, rehired, promoted, or received a merit on or prior to June 1, 2019 to be considered merit eligible.
- The Executive Budget Committee has approved a 3.0% self-funded merit pool for classified employees.
- Classified employees may be awarded a merit from 0 - 5.0%.
- Merit submitters and approvers can export their merit worksheets to Excel. Click the Export to Excel icon on the merit worksheet.
- Employee merit letters will be available for printing November 15 - December 15.

3. There are two merit plans:

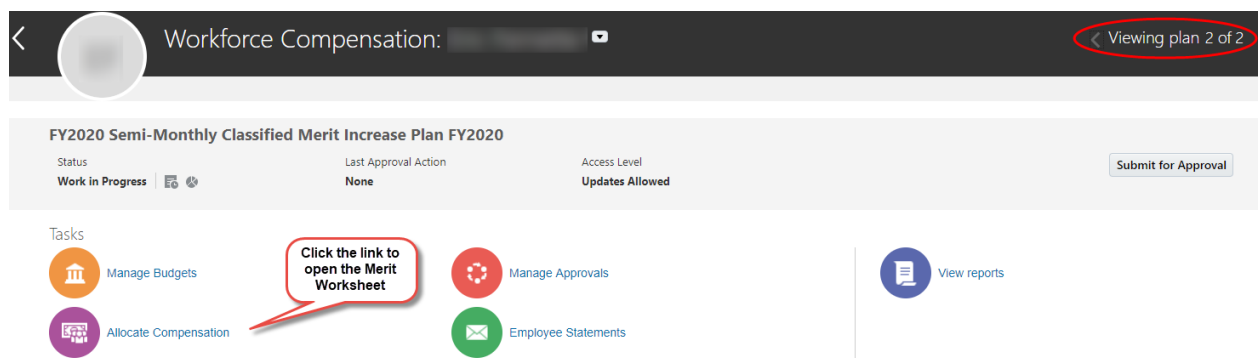
Approving Merit Increases

- **FY20XX Semi-Monthly Classified Merit Increase Plan**—contains all classified employees who meet the eligibility requirements for December merits.
 - **FY20XX Bi-Weekly Classified Merit Increase Plan**—contains non-exempt employees who are paid bi-weekly and who meet the eligibility requirements for December merits.
- The merit plan(s) that you will see depend on whether you have direct and/or indirect reports eligible for a merit within those plans.
- You may have access to one or both merit plans.
- a. To transition between semi-monthly and bi-weekly merit plans, click on the arrow on the right next to 'Viewing plan'.



The screenshot shows the 'Workforce Compensation' interface. At the top right, there is a dropdown menu labeled 'Viewing plan 2 of 2'. A red callout box points to this menu with the text: 'To view other plans, click the arrow.' Below the header, the main content area displays 'FY2020 Semi-Monthly Classified Merit Increase Plan FY2020'. It includes a status of 'Work in Progress', a last approval action of 'None', and an access level of 'Updates Allowed'. A 'Submit for Approval' button is visible on the right. Under the 'Tasks' section, there are five icons: 'Manage Budgets', 'Allocate Compensation', 'Manage Approvals', 'Employee Statements', and 'View reports'.

4. Once you have selected the correct merit plan you wish to view, select 'Allocate Compensation' from the icons under 'Tasks' to view the merit worksheet.



This screenshot is identical to the previous one, but with a red callout box pointing to the 'Allocate Compensation' icon in the 'Tasks' section. The callout text reads: 'Click the link to open the Merit Worksheet'.

- a. From the 'View' drop down menu, select 'Tree' to view a list of your employees and their respective merit entries.
- b. Click on 'View' once again and select 'Expand All' to review the merit entries for all of your employees.

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Summary: Direct Reports

Component

No data to display.

Actions ▾ View ▾ Format ▾

Employee I

Column

Tree

Columns

Freeze

Detach

Sort

Reorder Columns...

Current Annual Rate

Current Annualized Salary

Performance Rating

Enterable Performance Rating

Select 'Tree'

Summary: All Workers

Component

Merit

Lump Sum

Actions ▾ View ▾ Format ▾ Detach

Employee I

Column

List

Columns

Freeze

Detach

Expand

Expand All Below

Collapse All Below

Expand All

Collapse All

Scroll to First Ctrl+Home

Scroll to Last Ctrl+End

Sort

Reorder Columns...

Current Annual Rate

Current Annualized Salary

Performance Rating

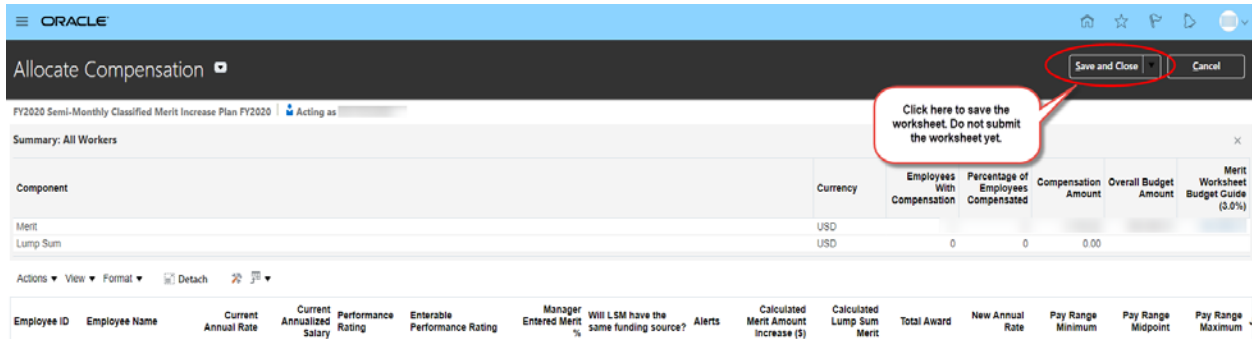
Enterable Performance Rating

Select 'Expand All'

- c. You can then review the merit worksheet and make changes if necessary.
 - Ensure that a merit % has been entered for all employees, including 0% for employees not receiving a merit.

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- d. If you make changes, remember to click the **Save and Close** button on the upper right corner of the screen to save the changes.



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Allocate Compensation

FY2020 Semi-Monthly Classified Merit Increase Plan FY2020

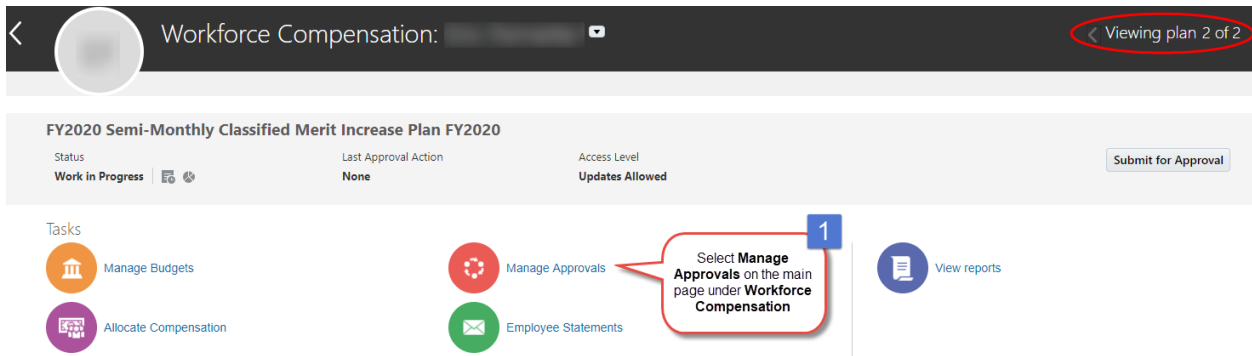
Summary: All Workers

Component	Currency	Employees With Compensation	Percentage of Employees Compensated	Compensation Amount	Overall Budget Amount	Merit Worksheet Budget Guide (0.0%)
Merit	USD					
Lump Sum	USD	0	0	0.00		

Employee ID Employee Name Current Annual Rate Current Annualized Salary Performance Rating Enterable Performance Rating Manager Entered Merit % Will LSM have the same funding source? Alerts Calculated Merit Amount Increase (\$) Calculated Lump Sum Merit Total Award New Annual Rate Pay Range Minimum Pay Range Midpoint Pay Range Maximum

The following instructions will provide instructions on how to approve or return a merit worksheet after reviewing merit entries.

1. Click the **Manage Approvals** link located at the top of the **Workforce Compensation** screen:
 - If you have more than one plan, be sure you are in the correct plan before approving.



Workforce Compensation: < Viewing plan 2 of 2

FY2020 Semi-Monthly Classified Merit Increase Plan FY2020

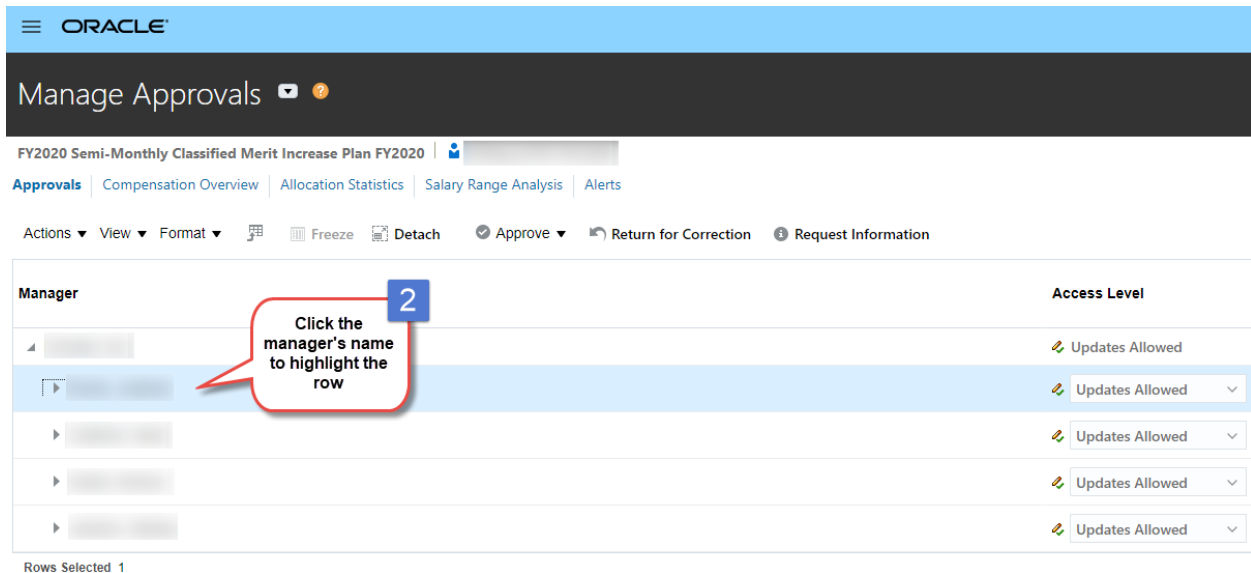
Status: Work in Progress | Last Approval Action: None | Access Level: Updates Allowed | Submit for Approval

Tasks

- Manage Budgets
- Manage Approvals
- Employee Statements
- Allocate Compensation
- View reports

2. If you would like to approve merit submissions for specific managers individually, click on the manager's name. The row will highlight when selected.

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Manage Approvals

FY2020 Semi-Monthly Classified Merit Increase Plan FY2020

Approvals | Compensation Overview | Allocation Statistics | Salary Range Analysis | Alerts

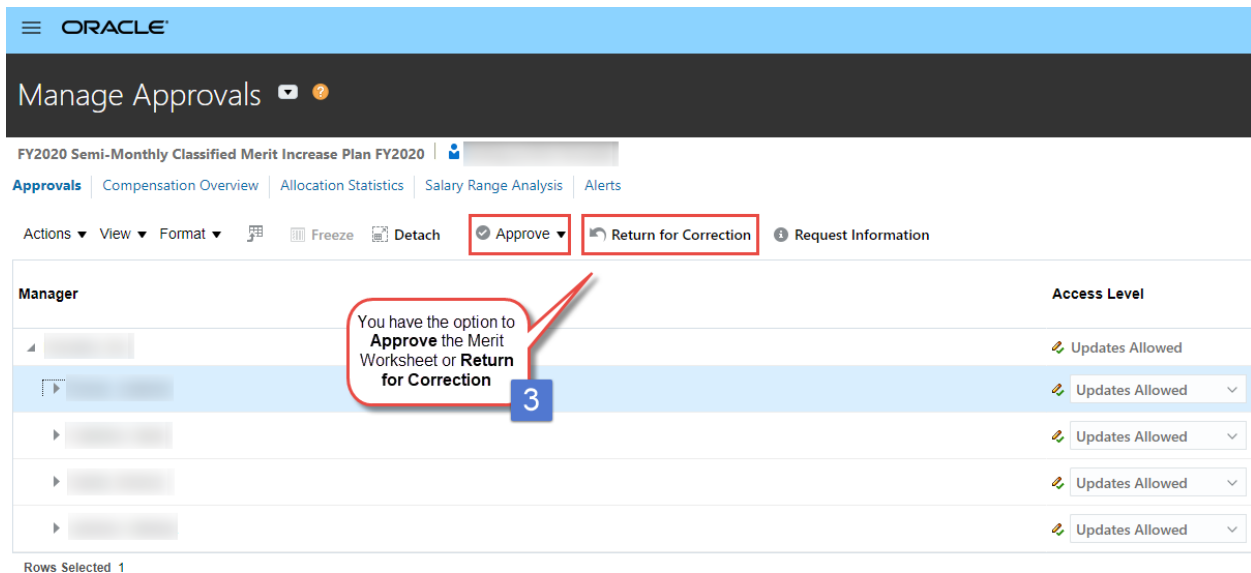
Actions | View | Format | Freeze | Detach | Approve | Return for Correction | Request Information

Manager	Access Level
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed

Rows Selected 1

2. Click the manager's name to highlight the row

3. You can either **Approve** the manager's Merit Worksheet or **Return for Correction**.



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Manage Approvals

FY2020 Semi-Monthly Classified Merit Increase Plan FY2020

Approvals | Compensation Overview | Allocation Statistics | Salary Range Analysis | Alerts

Actions | View | Format | Freeze | Detach | Approve | Return for Correction | Request Information

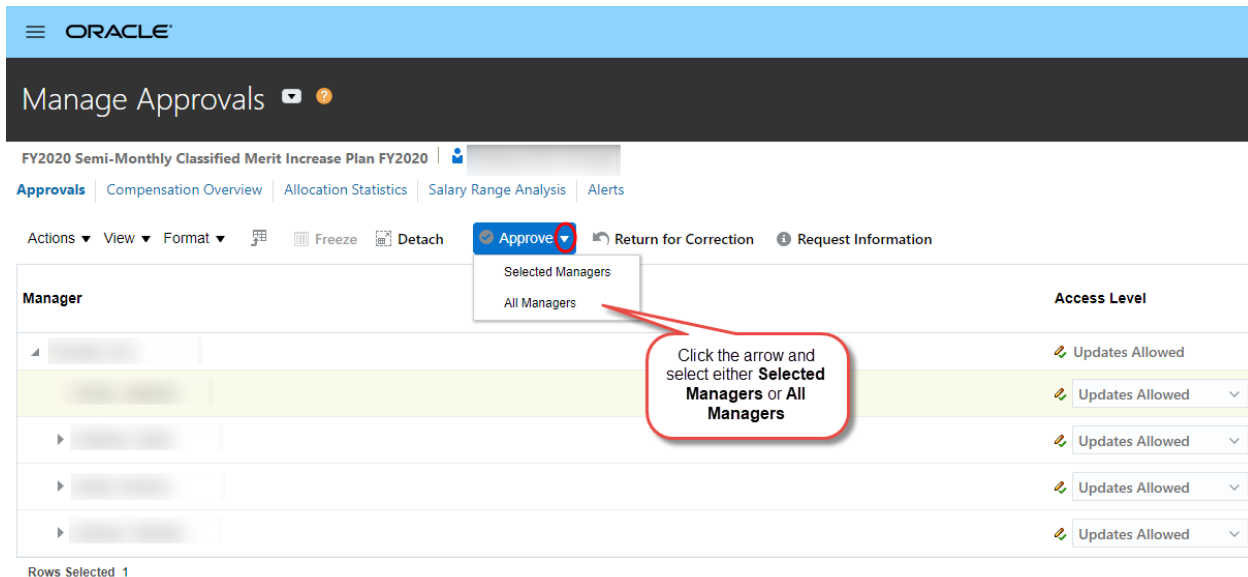
Manager	Access Level
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed
[Manager Name]	Updates Allowed

Rows Selected 1

3. You have the option to Approve the Merit Worksheet or Return for Correction

4. To approve, click the drop down arrow next to **Approve**. Choose the **Selected Managers** option. If the approver is ready to approve the worksheets for all of his or her managers, select **All Managers**.

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Manage Approvals

FY2020 Semi-Monthly Classified Merit Increase Plan FY2020

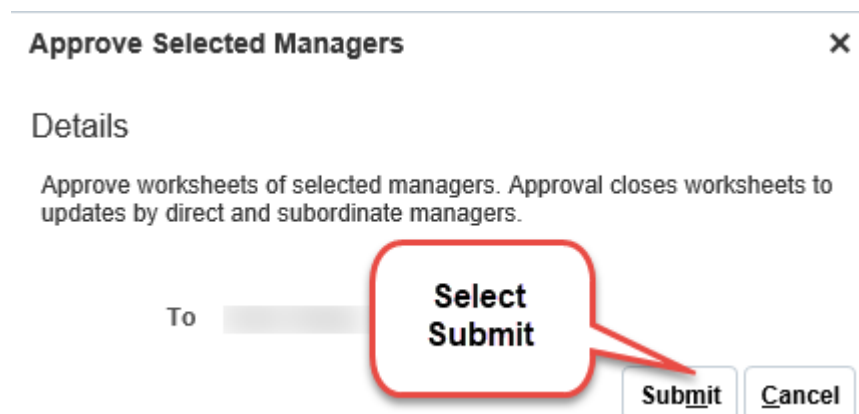
Approvals | Compensation Overview | Allocation Statistics | Salary Range Analysis | Alerts

Actions View Format Freeze Detach Approve Return for Correction Request Information

Manager	Access Level
[Redacted]	Updates Allowed
[Redacted]	Updates Allowed
[Redacted]	Updates Allowed
[Redacted]	Updates Allowed
[Redacted]	Updates Allowed

Rows Selected 1

- If you select **Selected Managers**, an **Approve Selected Managers** box appears, click submit.



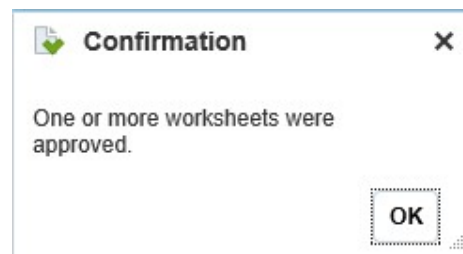
Approve Selected Managers [X]

Details

Approve worksheets of selected managers. Approval closes worksheets to updates by direct and subordinate managers.

To [Redacted] **Select Submit** [Submit] [Cancel]

- You will receive a confirmation box, which will confirm your Merit Worksheet has been approved. Click **OK**.



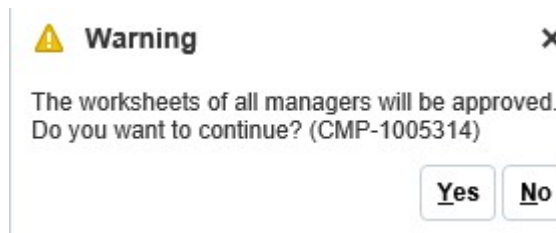
Confirmation [X]

One or more worksheets were approved.

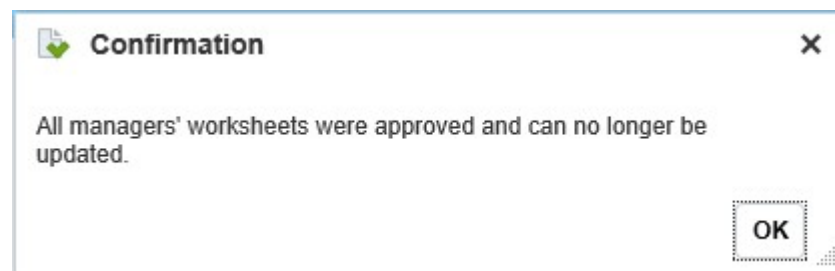
[OK]

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- If you select All Managers, a warning message appears. Selecting 'Yes' will approve all manager worksheets submitted.

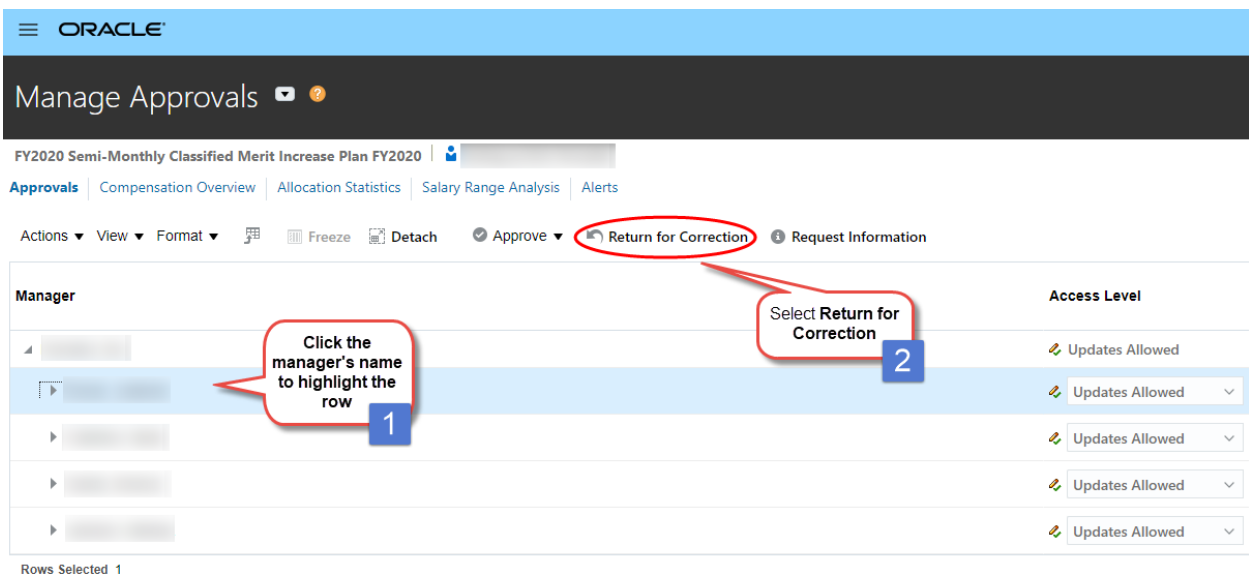


- You will receive a confirmation box, which will confirm your Merit Worksheet has been approved. Click **OK**.



- To return the manager's worksheet for correction, click the manager's name of the worksheet you wish to return.

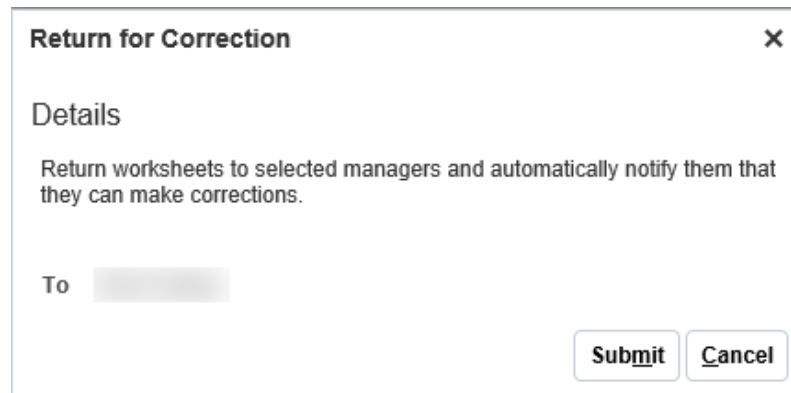
- Click the **Return for Correction** button.



The screenshot shows the Oracle Manage Approvals interface for the "FY2020 Semi-Monthly Classified Merit Increase Plan FY2020". The "Return for Correction" button in the top action bar is circled in red. A table lists managers with their names highlighted in blue. A red callout box with the number "1" points to the highlighted name, containing the text "Click the manager's name to highlight the row". Another red callout box with the number "2" points to the "Return for Correction" button, containing the text "Select Return for Correction". The table has columns for "Manager" and "Access Level", with the latter showing "Updates Allowed" for each row. At the bottom left, it says "Rows Selected 1".

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11. A box with the selected manager will open after you select **Submit** followed by a confirmation. This will return the Merit Worksheet to the manager to make corrections. ➤ The manager will have to resubmit the Merit Worksheet for approval.



12. You will receive a confirmation box, which will confirm your merit worksheet has been returned for correction. Click **OK**.

