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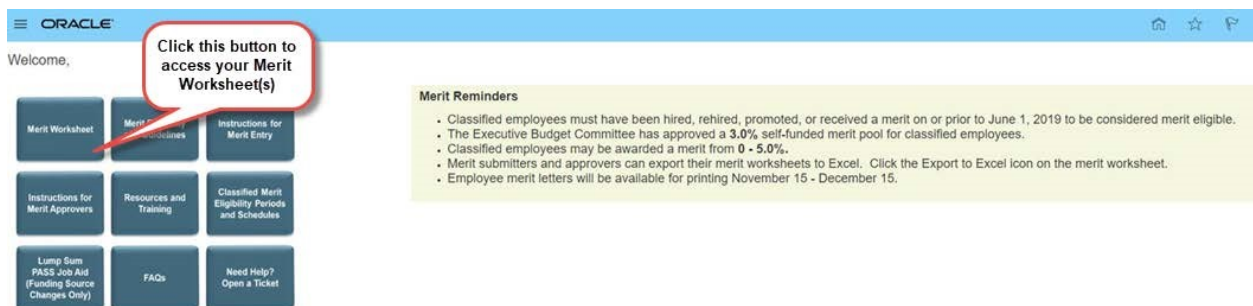
2. To access your merit plan worksheet:
   a. Click the **Merit Worksheet** button on the left side of the screen to access your merit worksheet(s).

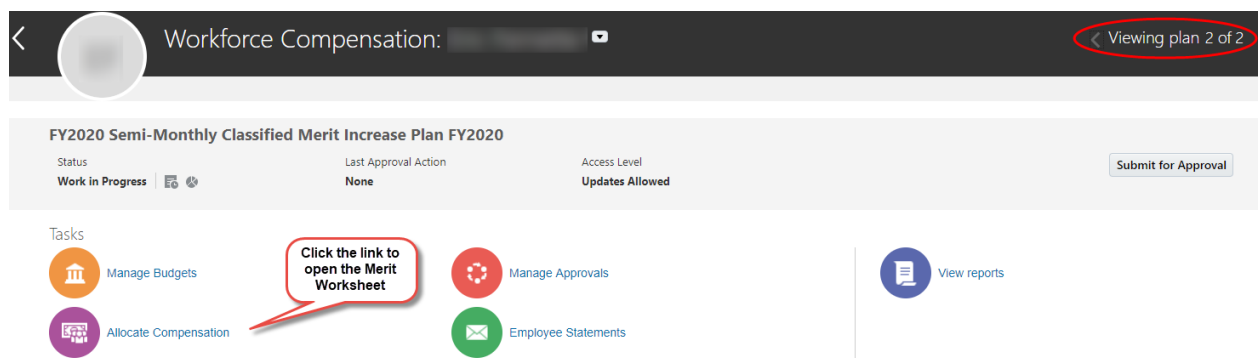

3. There are two merit plans:

Approving Merit Increases

- o **FY20XX Semi-Monthly Classified Merit Increase Plan**—contains all classified employees who meet the eligibility requirements for December merits.

- o **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'.

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.

- 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 <u>all</u> of your employees.

Approving Merit Increases

Summary: Direct Reports

Component

No data to display.

Actions ▼ | View ▼ | Format ▼ | [icon] | ~~tach~~ | [icons] ▼

Tree				
Employee I	Columns ►	Current Annual Rate	Current Annualized Salary	Performance Rating	Enterable Performance Rating
	Freeze				
◄	Detach				
Colum					
	Sort ►				
	Reorder Columns...				

Select 'Tree'

Summary: All Workers

Component

Merit

Lump Sum

Actions ▼ | View ▼ | Format ▼ | [icon] Detach | [icons] ▼

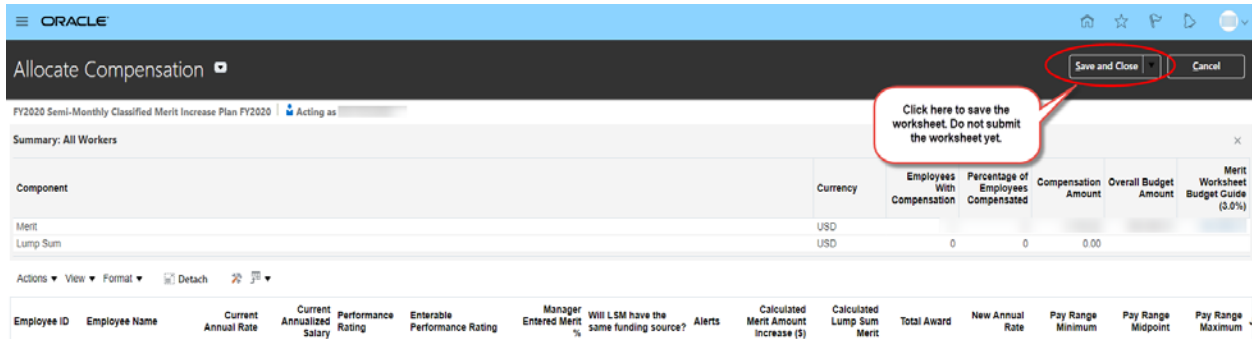| List				
Employee I	Columns ►	Current Annual Rate	Current Annualized Salary	Performance Rating	Enterable Performance Rating
	Freeze				
	Detach				
	Expand				
	Expand All Below				
	Collapse All Below				
◄	Expand All				
Colum	Collapse All				
	Scroll to First Ctrl+Home				
	Scroll to Last Ctrl+End				
	Sort ►				
	Reorder Columns...				

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.

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.

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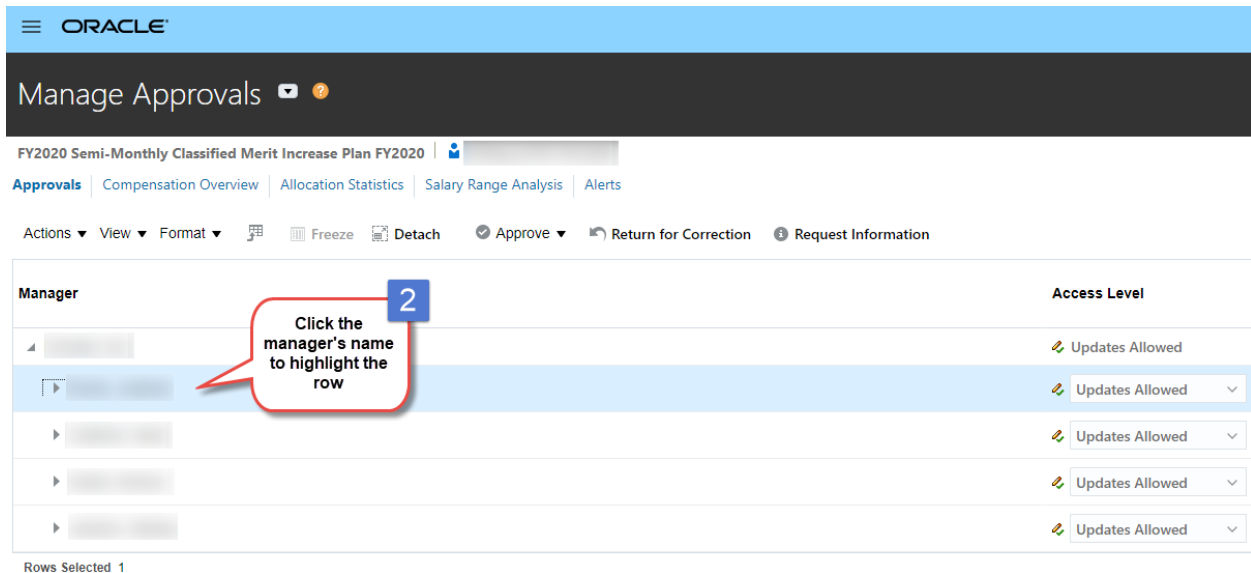
2. If you would like to approve merit submissions for specific managers individually, click on the manager's name. The row will highlight when selected.

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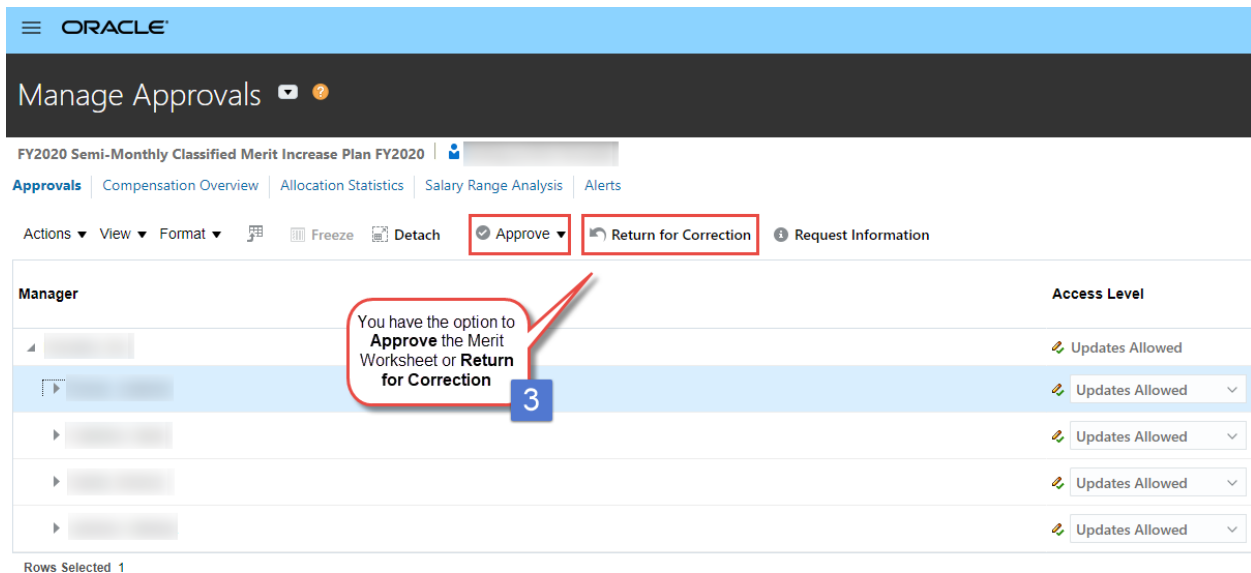
3. You can either **Approve** the manager's Merit Worksheet or **Return for Correction**.

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.**

Approving Merit Increases
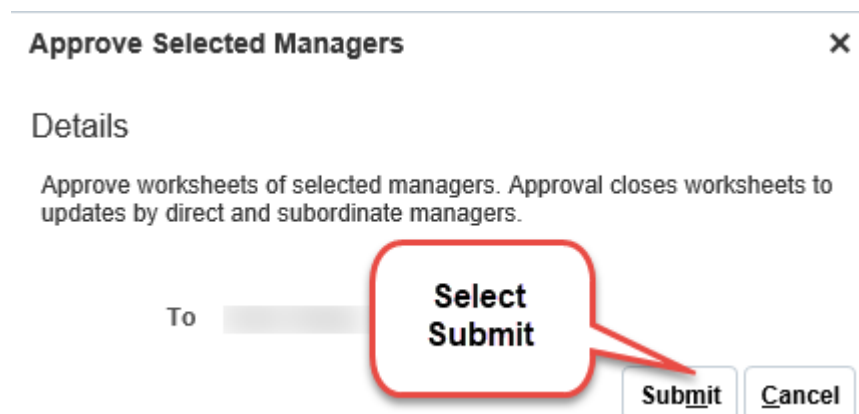
5. If you select **Selected Managers**, an **Approve Selected Managers** box appears, click submit.

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

Approving Merit Increases

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

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

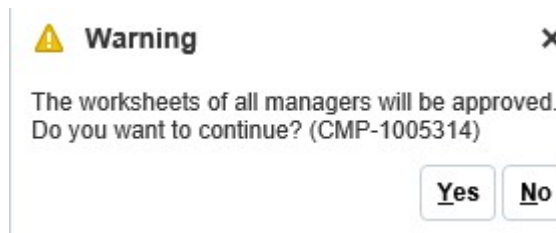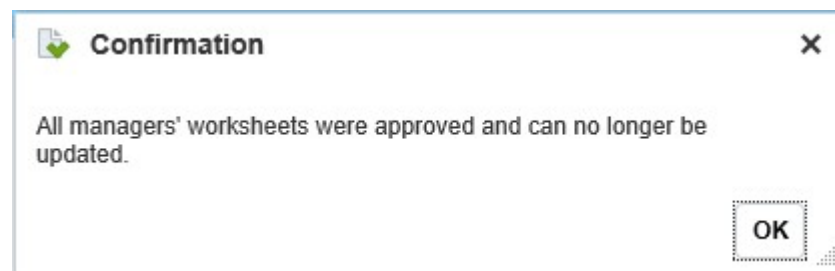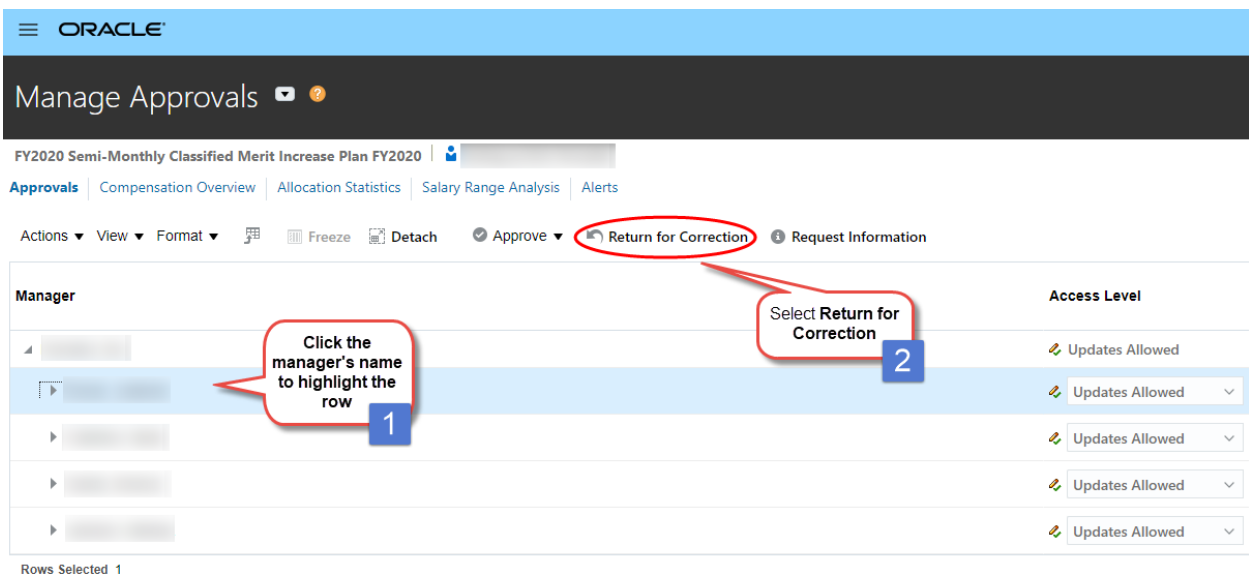9. To return the manager's worksheet for correction, click the manager's name of the worksheet you wish to return.
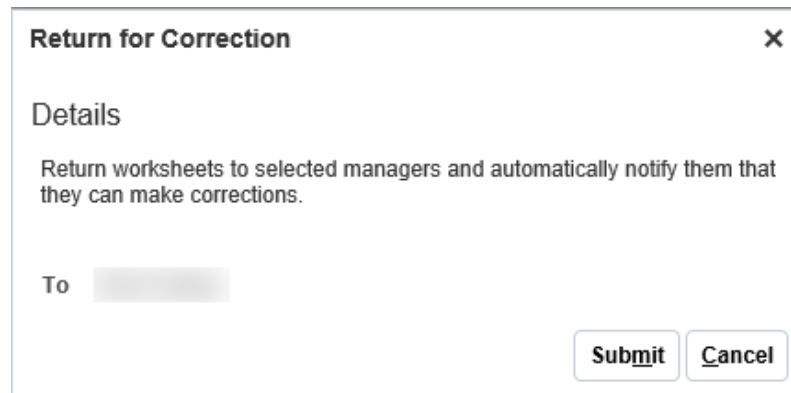
10. Click the **Return for Correction** button.

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.

Return for Correction   ✕

Details

Return worksheets to selected managers and automatically notify them that they can make corrections.

To

Sub**m**it   **C**ancel

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

Confirmation   ✕

The worksheet was returned for correction.

OK