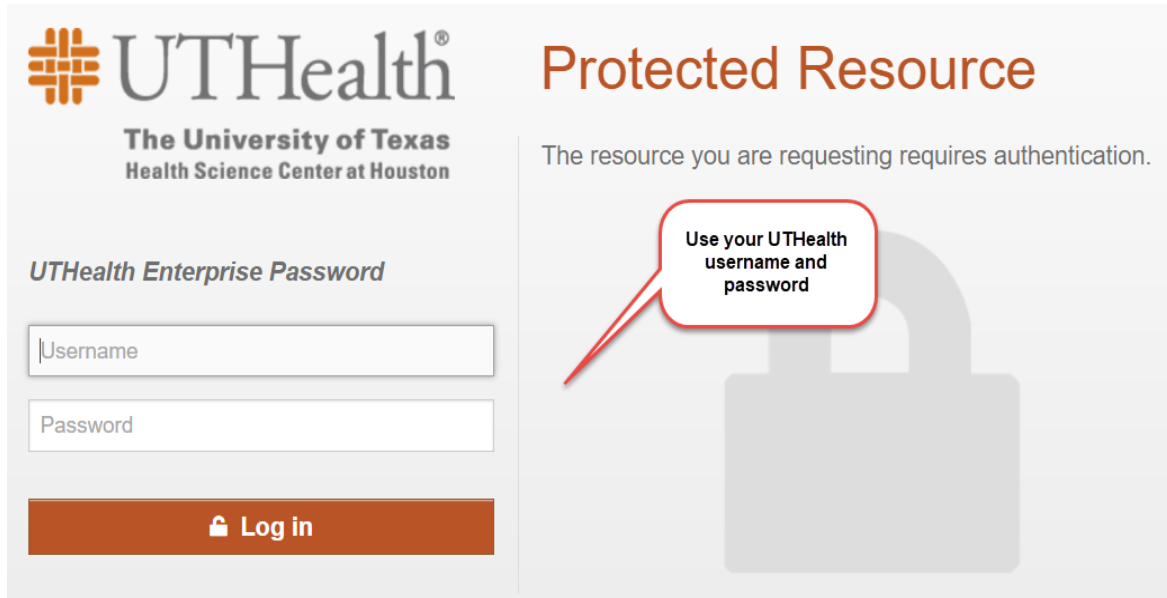# Entering Merit Recommendations

The following instructions will guide you through the process to enter merit recommendations in the Fusion Merit Tool.

➢ Log in to the **Fusion Merit Tool** using your UTHealth credentials: go.uth.edu/fusion

➢ 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).

➢ There are two merit plans:

o **FY20XX Semi-Monthly Classified Merit Increase Plan**—contains all classified employees that 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.

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➢ The merit plan(s) that you will see depends 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.

   b. To transition between the semi-monthly and bi-weekly merit plans, click on the arrow on the right next to 'Viewing plan'.
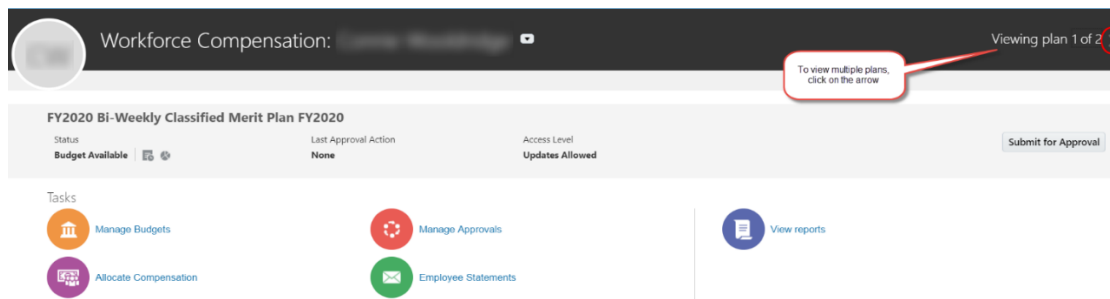
c. Select 'Allocate Compensation' from the icons under 'Tasks' to view the merit worksheet for the plan you have selected.
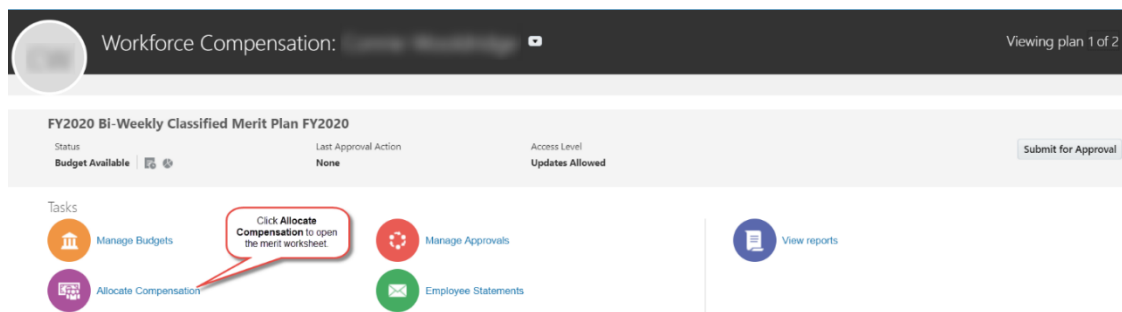
➢ By default, **only** your direct reports will appear on the merit worksheet. Please see below for other viewing options.
   a. To view and to enter merits for any of your direct report employees, click the dropdown arrow of the **View** menu located above **Employee ID** column and select **Tree**.

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b. Then Click the arrow to the left of any manager's name for whom you will be entering their employees' merits. This will display their direct reports on the merit worksheet so you can enter their merits.

c. To view and to enter merits for all direct and indirect employees, click the dropdown arrow of the **View** menu located above **Employee ID** column, and if not already selected, select **Tree** and then select **Expand All** from the **View** menu.

TIPS:

Are you entering merits for everyone in your organization?

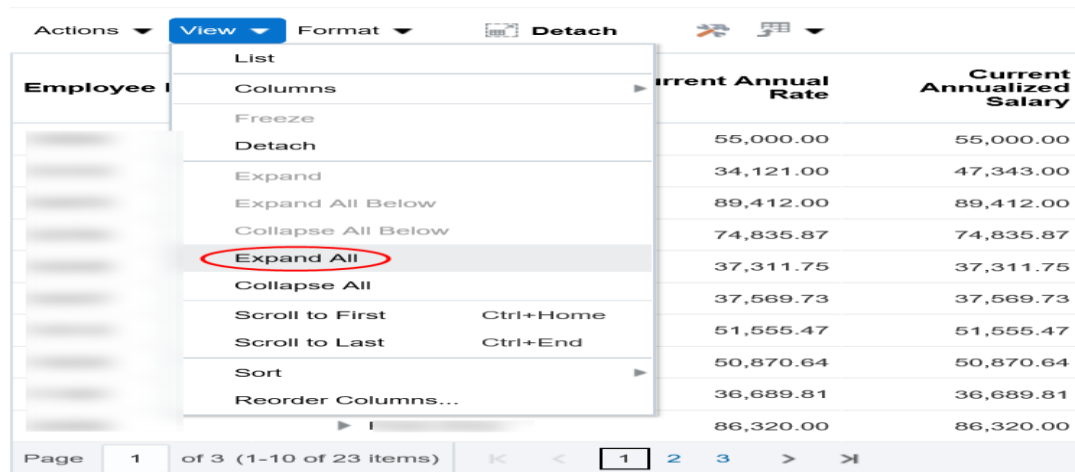➢ Click the dropdown arrow of the **View** menu located above **Employee ID** column and select **Tree**.

➢ Click the dropdown arrow of the **View** menu located above **Employee ID** column and select **Expand All**.

Do you want to enlarge the worksheet?

➢ Click the **Detach** button to maximize the view of the table.

➢ Click the **X** in the right hand corner of the detached table to close it.

➢ You will still have the ability to move from page to page by clicking the page numbers or arrows at the bottom left hand corner of the worksheet.

➢ There is **no Save** button on the Detach screen. Once you click the X, your changes will be reflected on the main screen. The detached table will minimize and all entries will be saved.

Entering Merit Recommendations

- To save your entries once you have returned to the main screen, click the dropdown arrow next to 'Save and Close' in the top right hand corner and click **Save**.
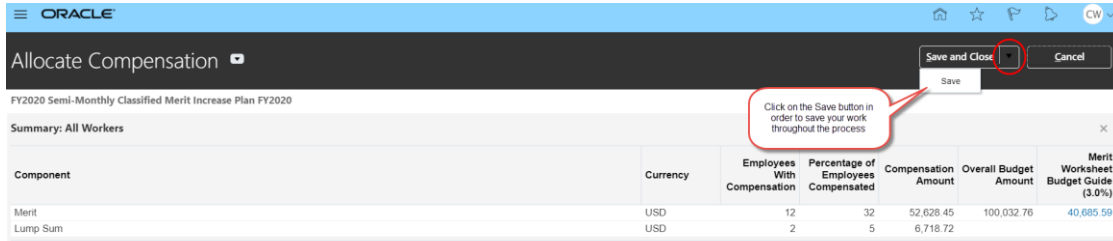
- Verify that all appropriate employees are showing on the worksheet. If you are missing employees, please review the **Merit Eligibility and Guidelines**.
    - If you believe the employee should be eligible, please contact your Compensation Services business partner.

- Performance ratings completed in P2A prior to the Fusion load will appear in the **Performance Rating** column.
    a. Select a performance rating for any employee that is missing a rating from the **Enterable Performance Rating** column. From the drop down menu, select one of the following **Performance Rating Options**:

Performance Rating Options	Eligible for merit increase?
Exceptional	Eligible
Exceeds Expectations	Eligible
Fully Meets Expectations	Eligible
Improvement Needed	Not Eligible
Unsatisfactory	Not Eligible
Not Applicable	Not Eligible

- Employees must have a current annual performance appraisal conducted in the last 12 months on file with a performance rating of "**fully meets expectations**" or better to be eligible for merit.

Entering Merit Recommendations

> ➢ You cannot enter a performance rating in the **Enterable Performance Rating** field if a rating was preloaded.

> ➢ Enter the recommended merit percentage increase in the **Manager Entered Merit %** column.

> ➢ If you choose not to give a merit increase to an employee, enter a merit percentage of 0%. Do not leave any "**Manager Entered Merit %**" fields blank.

Entering Merit Recommendations

➢ If the merit increase places the new annual rate over the pay range maximum, the overage will appear as a lump sum amount in the **Calculated Lump Sum Merit column**.

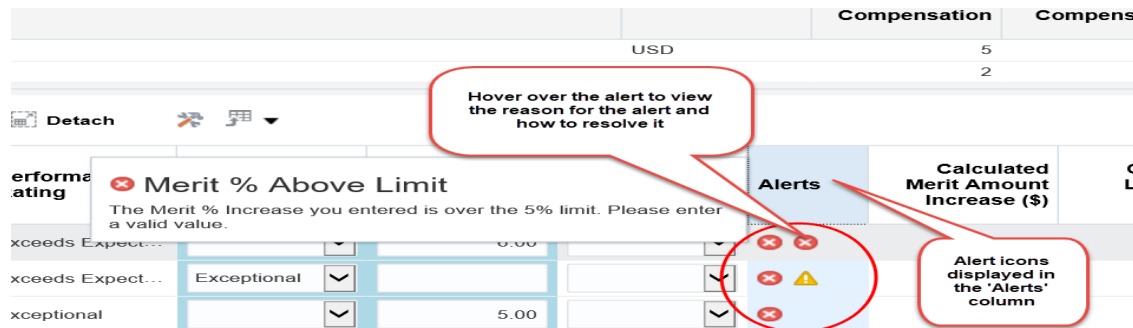| Current Annual Rate	Current Annualized Salary	Performance Rating	Enterable Performance Rating	Manager Entered Merit %	Will LSM have the same funding source?	Alerts	Calculated Merit Amount Increase ($)	Calculated Lump Sum Merit	T
142,057.83	137,253.94	Exceeds Expe···	⌄	5.00	Yes - No PA Req ⌄		10,598.06	1,308.72	
146,648.74	146,648.74	Exceptional	⌄		⌄	⚠	0.00	0.00	
124,200.00	124,200.00	Exceptional	⌄	5.00	Yes - No PA Req ⌄		800.00	5,410.00	
120,510.00	120,510.00	Exceeds Expe···	⌄	4.00	⌄		4,820.40	0.00	
113,712.00	113,712.00	Exceeds Expe···	⌄	3.00	⌄		3,411.36	0.00	
125,777.51	125,777.51	Exceptional	⌄	4.00	⌄		5,031.10	0.00	

a. Lump Sums Only—you must select **Yes** or **No** from the *Will LSM have the same funding source* column. **You only need to submit a PASS transaction if you are changing the funding source for the lump sum.**

➢ Selecting "Yes" – A **PASS transaction** is **not** required. The lump sum will be funded in accordance with regular payroll.

➢ Selecting "No" – The department will submit a **PASS transaction** to SDR if there is a funding source change. Follow your current process for submitting PeopleSoft changes to SDR.

Current nnual Rate	Current Annualized Salary	Performance Rating	Enterable Perf	Manager ·erit	Will LSM have the same funding source?	Alerts	Calculated Merit Amount Increase ($)	Calculated Lump Sum Merit	T
142,057.83	137,253.94	Exceeds Expe···			Yes - No PA Req ⌄		10,598.06	1,308.72	
146,648.74	146,648.74	Exceptional					0.00	0.00	
124,200.00	124,200.00	Exceptional		·.00			800.00	5,410.00	
120,510.00	120,510.00	Exceeds Expe···	⌄	4.00			4,820.40	0.00	
113,712.00	113,712.00	Exceeds Expe···	⌄	3.00	⌄		3,411.36	0.00	
125,777.51	125,777.51	Exceptional	⌄	4.00	⌄		5,031.10	0.00	

*Callout: Select **Yes - No PA Required** or **No - Submit a PA for funding change** in the "Will LSM have the same funding source?" column. Only use this column if your employee is getting a lump sum merit.*

Dropdown: Yes - No PA Required / No - Submit a PA for funding change / Search...

➢ Review and correct any outstanding alerts if applicable.
   a. Hover over the alert icon to view the reason for the alert and instructions on how to resolve the issue.

   ➢ A red circle with a white X indicates a hard stop. **You cannot save the worksheet until you resolve the alert.**

   ➢ A red circle with a diagonal line also indicates a hard stop. **You cannot submit the worksheet until you resolve the alert.**

➤ ⚠️ A yellow triangle with an exclamation point is a warning letting you know that the **Manager Entered Merit % column is** blank. You can still save and/or submit the worksheet.

➤ Click the **Save and Close** button when you have finished completing the merit worksheet.

➤ 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.

Did you complete merit entries for all employees in your organization?

    ➤ If yes, follow instructions for **Step A**.

    ➤ If you did not complete merit entries for all employees in your organization, follow instructions for **Step B**.

Entering Merit Recommendations

Step A:

- ➢ Click the dropdown arrow next to the **Approve** button and select **All Managers**.
- ➢ This is granting you the ability to submit merits for approval for all the managers listed.

Step B:

- ➢ If you would like to approve merit submissions for specific managers individually, click on the manager's name. The row will highlight when selected.
- ➢ Click the dropdown arrow next to the **Approve** button and click on **Selected Managers**.
- ➢ **Note:** You **will not** be able to submit your worksheet to the next level for approval until you have received and approved all merit worksheets from your managers who entered merits for their employees.

When you receive merit worksheets for approval from the managers that are entering merits, refer to the "**Approving Merit Increases**" job aid on the Merit Tool dashboard. (Click on the three-lined icon on the upper left-hand corner of the screen and select **My Dashboard**. Then click on **Instructions for Merit Approvers.**
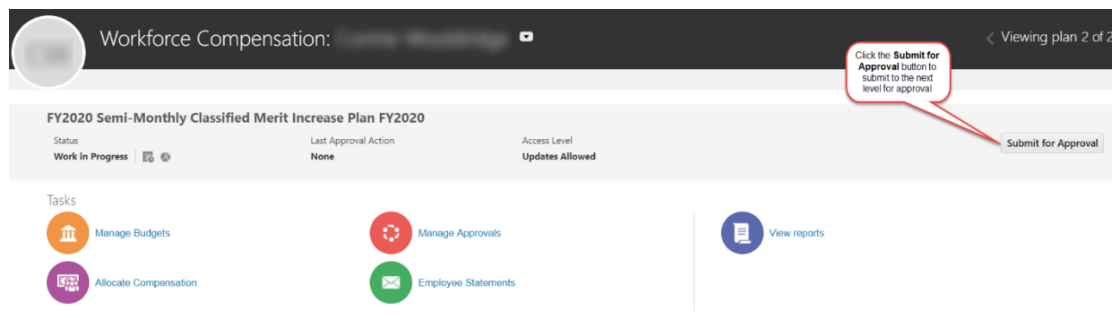
Entering Merit Recommendations
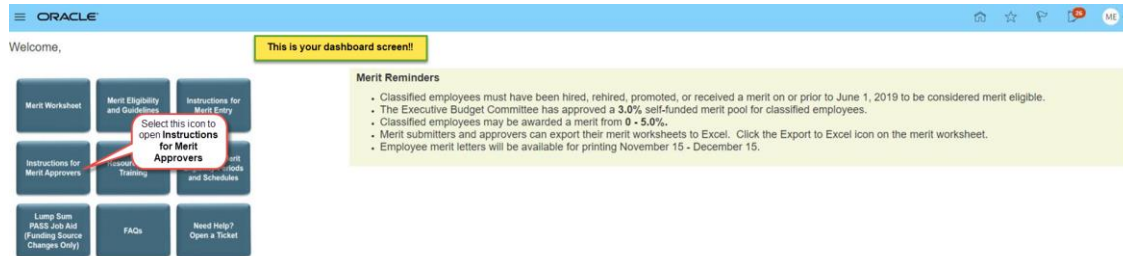
The **Approval Status** column will be populated once the merit worksheets have been approved. This needs to be populated for all managers to advance to the next step.
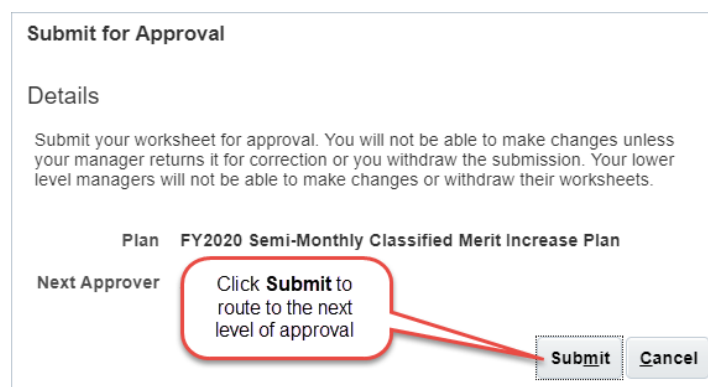
➢ Submitting completed worksheet(s).

** You will not be able to submit your worksheet until you have approved all of your manager direct report merit worksheets.

a. Click the **Save and Close** button and then click the **Submit for Approval** button at the top right side on the **Workforce Compensation** screen.
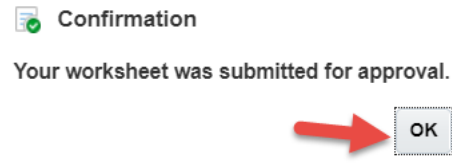

b. Click the **Submit** to route to the next level of approval.

c. A confirmation box will open.

d. Click **OK** to confirm.
   ➢ The approver will be alerted that the worksheet is ready for approval.
   ➢ This concludes the manager submission process.

➢ You may withdraw submission of the worksheet to make changes if it has not already been approved at the next level.

   ➢ Click **Withdraw** in the top right corner.