Staff Salary Pre-Planning and Merit Process

Objective: This guide reviews the steps necessary to initiate the pre-planning and submission of the staff merit process.

- Run and populate employee information into the Staff Salary Pre-Planning Tool workbook
- Propose merit

Additional Information

- Merit Dashboards & Reports are available using the Dashboard worklet.

The staff salary pre-planning process allows departments to model merit for the organizations prior to the launch of Merit. The tool is intended to be used to gather performance ratings, merit recommendations and related calibration and approvals.

The merit business process may only be initiated and submitted during the period in which the merit submission process is live in Workday. Once merit is launched, Salary Planners will find a Propose Merit item in their Inbox indicating merit has begun.

Merit Review Process

The Staff Salary Pre-Planning Tool report loads merit information for employees into an Excel based modeling workbook. Prior to proposing merit, those individuals with a role in the process, as outlined in the exhibit above, will have access to run this report which will automatically download employee information for their organization.

Users can choose whether to download select supervisory organizations or all their supervisory organizations at one time. Information can be downloaded and distributed to units to collect ratings and proposed Merit awards from unit managers.

Run and populate employee information into the Staff Salary Pre-Planning Tool workbook

In order to access the employee information contained in the Staff Salary Pre-Planning Tool Excel data modeling workbook, the report must be scheduled.

Reports can be scheduled to Run Now or setup to automatically run as frequently as you need to view updated information.

Scheduled reports will be saved to your Workday My Reports.

To schedule this report:

1. Use the search bar to locate the task: Schedule a Report
2. In the Report field search for and select the report: Staff Salary Pre-Planning Tool – Yale.
3. Select the **Run Frequency**: how often you need to see updated information.

   ![Run Frequency](run_frequency.png)

4. Click **OK** to open the scheduling options page which displays tabs (the number of tabs will vary depending on the run frequency chosen).

   ![Tab Selection](tab_selection.png)

5. On the **Report Criteria** tab, determine which report option you prefer (Supervisory Org or Supervisory Org and subordinates) and click the ± prompt in the **Value** field to search for and select the supervisory organization(s).

   - If you choose: **Run Now**
     Wait a few minutes for the report to process then retrieve the Excel report, with the integrated employee information, from the My Reports.
   - If you choose a Run Frequency other than **Run Now**, continue following these instructions.

6. Go through the **Schedule** tab options and complete the required fields.

7. The **Output** tab contains a field **File to be Deleted After (Days)** which defaults to 5 days. You may want to increase this number.

8. Click **OK** to schedule the report.

9. After the scheduled time, retrieve the Excel file from your My Reports.
   - To open your My Reports: click your name (top right), select My Reports from the menu.

10. **Save the Excel workbook** to your computer and click the **Enable Editing** button at the top to begin.

    ![Make Note](make_note.png)

    **Make Note**

    *Be sure to save a copy of the initial report* as your baseline report. Subsequent reports will reflect employee changes but will not carryover any data inputs you entered.

    **You will need to re-enter** the performance rating, status code and merit $ recommendations on all subsequent reports.

For detailed instructions about scheduling a report visit the [Workday@Yale training website](http://workday.training.yale.edu) and search for the **Reporting: Tools and Features** training guide.

---

### Propose Merit

1. Click your **name** (top right).

2. Select **Inbox** from the menu.

3. In the **Actions** tab, click on the item labeled **Propose Merit: Staff Annual Review (Merit)** and click **Propose**.

4. At the top left of the screen, you can view the **Remaining Merit Pool** indicating the amount of money remaining available to allocate to your employees. This will update based on the merit pay you award to your employees.

   ![Remaining Merit Pool](remaining_merit_pool.png)

   **Remaining Merit Pool**

   6,540.18 USD

5. If necessary, click on the **Performance** tab.
Staff Salary Pre-Planning and Merit Process

6. Enter one of the following Performance Ratings and Merit Status Code combinations for each employee listed:

- Exceptional
- Exceptional/No increase
- Exceptional/Ineligible
- Exceptional/Leaving
- Exceptional/Other
- Meets/Exceeds
- Meets/Exceed/No Increase
- Meets/Exceeds/Ineligible
- Meets/Exceeds/Leaving
- Meets/Exceeds/Other
- Needs Improvement/No increase
- Needs Improvement/Ineligible
- Needs Improvement/Leaving
- Needs Improvement/Other
- Unsatisfactory/No increase
- Unsatisfactory/Ineligible
- Unsatisfactory/Leaving
- Unsatisfactory/Other
- Too New to Rate

8. Assign pay using one of the following fields:
   - Merit $
   - Merit %
   - Base Adj $
   - Base Adj %
   - Lump-Sum $
   - Lump-Sum %

   Note: Reference the pay elements from the Staff Salary Pre-Planning tool to complete this step.

9. Enter a comment to provide reasoning if you are changing the base adjustment or lump-sum. All comments will remain part of a permanent record viewable by others.

10. Click Continue.

11. Review all information to ensure that it is correct.

12. Click Submit.

Promotion Tab

Promotions and increases associated with a promotion are entered by clicking the Promotion tab.

1. Promote: click and select Yes if an in-seat promotion is due on 9/1.

Note: Reference the ratings/codes entered in the Staff Salary Pre-Planning tool to complete this step. Refer to the Guidelines tab to view the full chart.
2. **Position:** will auto-populate with current information.

3. **Job Profile** and **Business Title:** all auto-populate with current information when you click out of the field. Update the information if necessary.

4. **Promotion %** and **Promotion Amount:** enter either a dollar amount or a percentage and the other field will auto-populate.

5. **Promotion Notes:** enter **Notes** to provide further detail.

**Note:** If you need to reference Merit after it has been submitted, click on the **Archive** tab in your Inbox.

**Merit Dashboards & Reports**

To view the Merit dashboard, click the **Dashboards** worklet and click **Merit Process Administration Dashboard.**

The following reports will display:

- **Staff – Merit Spend To-Date - Yale:** View the overall spend on merit to date for the supervisory organization you support or manage.

- **Staff – Performance Rating Distribution – Yale:** View the overall distribution of performance ratings that have been entered for the M&P staff in your units. Further detail can be obtained by clicking "View More." under the chart on the Merit Process Administration Dashboard, which links to the report **Staff - Merit Rating Distribution - Yale.**

- **Staff – Average Merit Spend by Rating – Yale:** View % Spend for only Merit & Lump Sum Only.

- **Staff - Merit Process - Employee Details – Yale:** View a specific Supervisory Organization that will automatically return people in the organizations you manage or support.

- **See Appendix A:** Table 1 is a mapping table where the report is providing “Spend” information. The calculation column explains how the field is calculated. Example report: Staff – Merit Spend To-Date by Job Type – Yale.

**Delegating the Merit task (if needed)**

If you have been instructed by your Strategic Business Partner to delegate the merit task, please review the instructions as provided here: [http://workday.training.yale.edu/training-materials/manage-delegations](http://workday.training.yale.edu/training-materials/manage-delegations)

If you are in the Merit Spend Approver role and will be out of the office, after you have provided your approval, please delegate the Merit task as instructed by your leader.
## Staff Salary Pre-Planning and Merit Process

Appendix A:

### Table 1

<table>
<thead>
<tr>
<th>Field (Column Header Override)</th>
<th>Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Base Pay</td>
<td>Total Current Base Pay excluding employees with ineligible merit ratings and/or Merit Target Percentage is equal to &quot;0&quot;</td>
</tr>
<tr>
<td>Proposed Base Pay</td>
<td>Total Proposed Base Pay excluding employees with ineligible merit ratings and/or Merit Target Percentage is equal to &quot;0&quot;</td>
</tr>
<tr>
<td>% Spend (w/ promotions)</td>
<td>Total Merit Spend (Merit Increase + Base Adjustment + Lump Sum + Promotion Increase) / Current Base Pay</td>
</tr>
<tr>
<td>% Spend (w/out promotions)</td>
<td>Total Merit Spend (Merit Increase + Base Adjustment + Lump Sum) / Current Base Pay</td>
</tr>
<tr>
<td>% Promotion Spend</td>
<td>Total Promotion Spend / Current Base Pay</td>
</tr>
<tr>
<td>Total Merit Spend (w/out promotions)</td>
<td>Merit Increase + Base Adjustment + Lump Sum</td>
</tr>
<tr>
<td>Total Merit Spend (w/ promotions)</td>
<td>Merit Increase + Base Adjustment + Lump Sum + Promotion Increase</td>
</tr>
<tr>
<td>Merit Amount Remaining</td>
<td>Merit Pool Target - Total Spend Amount</td>
</tr>
</tbody>
</table>