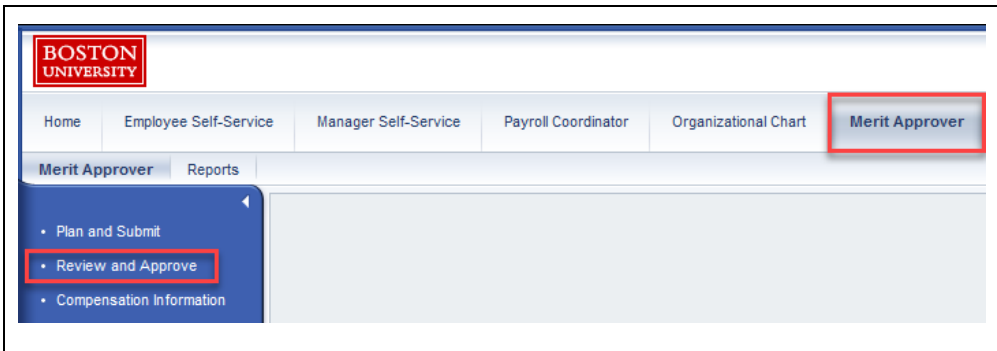
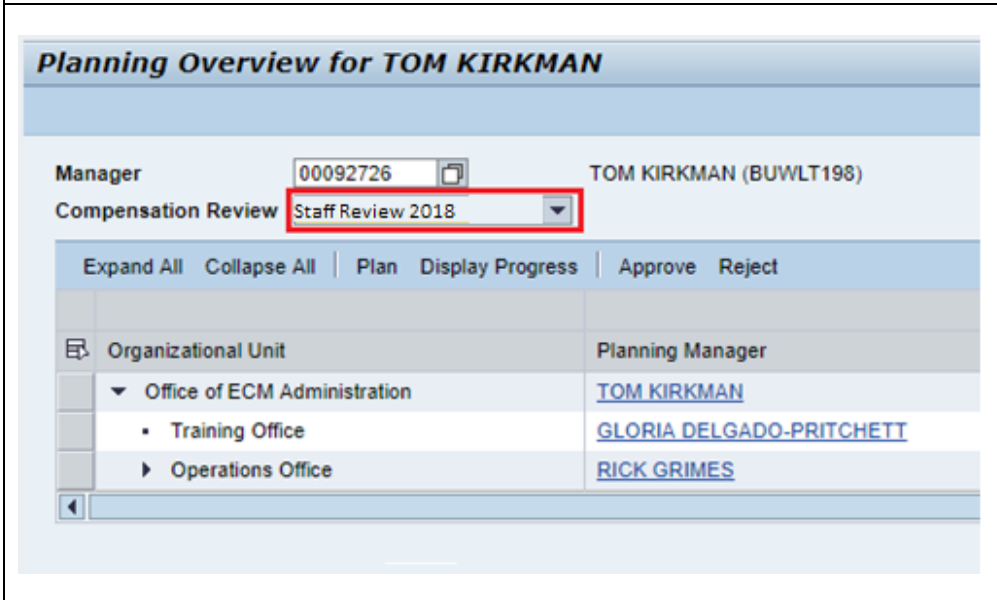





Manager Approval for Staff Merit Recommendations

A merit approver needs to review and approve the staff merit increases that a recommending manager submits during the review process. An approver also has the ability to make updates to entries that have been submitted for review. While approving keep in mind that all sub units in a department must be approved in order for the merit process to be completed for your area.

Approving/Rejecting Merit Planning:

 <p>The screenshot shows the BUworks Central interface. The top navigation bar includes links for Home, Employee Self-Service, Manager Self-Service, Payroll Coordinator, Organizational Chart, and Merit Approver. The Merit Approver tab is selected and highlighted with a red box. Below the navigation bar, there is a sidebar with a 'Merit Approver' section containing three sub-items: Plan and Submit, Review and Approve (highlighted with a red box), and Compensation Information.</p>	<ol style="list-style-type: none">1. Log on to BUworks Central https://ppo.buw.bu.edu2. Select the Merit Approver tab.3. Click on Review and Approve.
 <p>The screenshot shows the 'Planning Overview for TOM KIRKMAN' screen. The 'Manager' field is set to '00092726' and 'TOM KIRKMAN (BUWLT198)'. The 'Compensation Review' dropdown menu is set to 'Staff Review 2018' and is highlighted with a red box. Below this, there are buttons for 'Expand All', 'Collapse All', 'Plan', 'Display Progress', 'Approve', and 'Reject'. A table lists the 'Organizational Unit' and the 'Planning Manager' for each unit. The units listed are 'Office of ECM Administration', 'Training Office', and 'Operations Office'. The corresponding planning managers are 'TOM KIRKMAN', 'GLORIA DELGADO-PRITCHETT', and 'RICK GRIMES'.</p>	<ol style="list-style-type: none">4. Using the Compensation Review drop down select Staff Review 20[XX] (the year in which the merit cycle begins). In the example to the left, Staff Review 2018 is selected for the merit cycle that began in 2018 with merit increases effective January 1, 2019. <div data-bbox="1066 997 2007 1141"><p>Important Tip: If you are a manager, your direct reporting org units will load on the Planning Overview screen once step #4 is complete. If you are acting on behalf of a manager as a substitute approver, click here (page 4) for instructions on how to proxy yourself to that manager.</p></div>

Manager Approval for Staff Merit Recommendations

Planning Overview for TOM KIRKMAN

Manager: 00092726 TOM KIRKMAN (BUWLT198)
 Compensation Review: Staff Review 2018

Expand All Collapse All Plan Display Progress Approve Reject

Organizational Unit: Planning Manager
 Office of ECM Administration: TOM KIRKMAN

Manager: 00092726
 Compensation Review: Staff Review 2018
 Expand All Collapse All Plan Display Progress

Organizational Unit:
 Office of ECM Administration
 Training Office
 Operations Office
 Communications Office

Display for: All Employees

Status	Staff Merit NonExempt				Staff Merit Exempt		
	Employees	Total	Distributed	Remaining	Total	Distributed	Remaining
△	15	7,753.20	3,476.20	4,277.00	21,528.00	3,744.00	17,784.00
■	4	2,657.20	1,365.00	1,292.20	3,744.00	3,744.00	0.00
■	6	2,548.00	1,255.80	1,292.20	9,684.00	0.00	9,684.00
●	3	1,201.20	800.80	400.40	5,688.00	0.00	5,688.00

Expand All Collapse All Plan Display Progress Approve Reject

Organizational Unit: Planning Manager
 Office of ECM Administration: TOM KIRKMAN
 Training Office: GLORIA DELGADO-PRITCHETT
 Operations Office: RICK GRIMES
 Communications Office: ALEX KIRKMAN

Status: △ ■ ■ ●

5. Make sure to select **Staff Review 20[XX]** under **Compensation Review**. If you wish to view any subunits click on the parent org unit and click **Expand All**, or click on the **arrow** to the left of the unit's name.

6. Through the **Planning Overview** screen you can view an [org's status](#) (status listed on page 3), employee counts, total guideline, distributed spend and remaining spend of each org by Exempt and Non-Exempt employee groups. Located in the upper right corner is the "**Display For**" pulldown. This changes the way the employee count and spend is displayed on the overview screen:

- **Direct Reports Only** will aggregate on the planning org level showing only the employee count, guideline and spend for the listed planning org.
- **All Employees** will show the rollup of employee count, guideline and spend from the sub planning orgs to the parent org

Important Tip: The employee count for the named org is counting only the employees that are planned in the listed org. Managers are usually planned in the org above where their actual position resides

7. You have four options when acting on an org unit. To act on a org unit, click on its name (the unit's row will be selected) and select one of the following options:

- **Plan:** Allows you to see the planning worksheet for the selected org and, if necessary, modify a submitted or planned status org. Please follow [these instructions](#) (page 5) if you need to plan or modify an org.
- **Display Progress:** Allows you to see the timeline of when an org was planned/approved/and or rejected and who took the action.
- **Approve:** Allows you to set a planned/submitted org's status to Approved. Only an org in a yellow △ **Requires Approval** triangle can be approved. Once approved, the status will change to a green square ■. Once all org units in your area are green you are done approving at that dept. level.
- **Reject:** Allows you to set a planned org's status back to "In Planning", status represented by a red circle ●. If you are rejecting a parent org that was "In Planning" status it is possible you will move "Approved" subunits back to "Requires Approval" status. If you reject an org be sure to reach out to the applicable planning manager so they can re-plan and re-submit their org for review. There is no auto-message that a unit was rejected.

Manager Approval for Staff Merit Recommendations

Example of approving (parent and sub units):

In the example below Manager Tom Kirkman highlighted the org “Operations Office” and approved resulting in the parent org (ops) and also the sub org “Communications Office” being approved at the same time. Note both were in yellow **Requires Approval** status and both units had eligible staff members for review.

Manager: 00092726 TOM KIRKMAN (BUWLT198)
Compensation Review: Staff Review 2018

Expand All Collapse All Plan Display Progress **Approve** Reject

Organizational Unit	Planning Manager	Status
Office of ECM Administration	TOM KIRKMAN	
Training Office	GLORIA DELGADO-PRITCHETT	
Operations Office	RICK GRIMES	
Communications Office	ALEX KIRKMAN	

Approve Planning

Some organizational units below your selection are not yet approved. Click OK if you want to proceed and approve them all at once.

OK Cancel

Manager: 00092726 TOM KIRKMAN (BUWLT198)
Compensation Review: Staff Review 2018

Expand All Collapse All Plan Display Progress **Approve** Reject

Organizational Unit	Planning Manager	Status
Office of ECM Administration	TOM KIRKMAN	
Training Office	GLORIA DELGADO-PRITCHETT	
Operations Office	RICK GRIMES	
Communications Office	ALEX KIRKMAN	

Important notes on Approving/Rejecting

The org unit's status is important when approving or rejecting. Possible status are:

In Planning: You cannot approve/reject an org in this status. It must first be planned and submitted for review before taking any approval/rejection actions. If needed you can plan the org following these [instructions](#).

Important Note: Approving Multiple Orgs from the Top Down: If you are an approver for an entire department it is possible to approve the top level parent org and its sub units at the same time*. In order to do this you must make sure all sub orgs are in a yellow **Requires Approval** status when you **Approve** the parent org. (see example to the top left for the approving of the Operations & Communications Offices).

*. In these cases an approver will have to subunits first. If you have any approval issues please do not hesitate to contact hrcomp@bu.edu

represents **three possible scenarios**, hover over a triangle for the status:

Scenario A: Requires Approval. You can approve or reject an org in this status as long as the approver is not the manager of the org unit. An attempt to approve/reject under that circumstance will result in the error message: “**You cannot approve or reject the planning for your own organization**”. An approving manager at a higher level will need to approve/reject your org.

Scenario B: Subunits Require Approval. There are no employees in the top level org units to plan but the org units below have employees in planned status awaiting approval.

Scenario C: Subunits Open. If the top level Org. Unit is empty (*has no employees*) but there are sub orgs that require merit planning

Approved: Org is in approved status. It is possible for an approving manager to set this status back to **In Planning** if they reject an approved org. Please keep in mind an approver cannot reject back their own org and, when rejecting, it is possible you will move “**Approved**” status subunits back to “**Requires Approval**”.

Manager Approval for Staff Merit Recommendations

Approving Units as a Substitute (Acting on behalf of another manager)

Planning Overview for TOM KIRKMAN

Manager: 00092726 TOM KIRKMAN (BUWLT198)

Compensation Review: Staff Review 2018

Expand All Collapse All Plan Display Progress Approve Reject

Organizational Unit Planning Manager

Planning Overview for TOM KIRKMAN

Manager: 00092726 TOM KIRKMAN (BUWLT198)

Compensation Review: Staff Review 2018

Expand All Collapse All Plan Display Progress Approve Reject

All Values: Restrictions

Results List: 4 results found for Manager

Empl./Appl. Name	Personnel No.	User Name	Org. Unit Short Text
ALEX KIRKMAN	00092731	ALEXKMN	Communications Office
GLORIA DELGADO-PRITCHETT	00092733	ERAMONESTEST	Training Office
RICK GRIMES	00092739	GRIMES	Operations Office
TOM KIRKMAN	00092726	BUWLT198	Office of ECM Administrat

OK Cancel

1. Enter the **PERNR** of the manager you want to proxy in the **Manager Selection** box and press **Enter**.

If you do not have the **PERNR** you can search for a manager by name:

2. To find a manager by name, click on the **match box icon (as shown by the arrow)**. If you see the manager's name you can highlight and click **OK**. Otherwise click the **Show Search Criteria** button.

3. Click on **Show Criteria** and enter the manager's name in the Employee Name box and click **Start Search**. Please note, the search matches both first and last name in one search. If you only have one of the names use the * wildcard. For example when searching Rick Grimes use *Grimes*. The search is not case sensitive.

4. A list of matching employees with that name will be displayed. Click on the **manager's name that you want to proxy** to select a manager from the results list. Click **OK** to select the manager.

5. Follow instructions listed [here](#) to approve the manager's reporting orgs (page 2 step 5).

Manager Approval for Staff Merit Recommendations

Modifying an org unit that is in Submitted status

Compensation Planning: Staff Review 2018 (Power User Mode), Step 2 (Plan Compensation)

Previous Next Save

1 2 3
Select Employees Plan Compensation Data Review and Submit

Manager: TOM KIRKMAN (BUWLT198)

Exempt Non-Exempt

Guideline

Staff Merit NonExempt

Office of ECM Administration 855.40 / 2,548.00 (USD) Remaining: 1,692.60 (USD)

Training Office 1,365.00 / 2,657.20 (USD) Remaining: 1,292.20 (USD)

Operations Office 455.00 / 1,346.80 (USD) Remaining: 891.80 (USD)

Communications Office 800.80 / 1,201.20 (USD) Remaining: 400.40 (USD)

View: Default Compensation Export Individual Planning Salary History

Check	Name	Grade	Prior Yr Rating	Curr Yr Rating	Curr Salary / Rate	Merit %	Merit Amt	Adj %	Ad
					0.01-99,999,999.00				
							1.9100		0.
■	WRIGHT, SETH	GR24	0000	3	23.5499	1.00	0.2400	0.00	0
■	DUNPHY, CLAIRE	GR24	0000	3	22.7500	1.00	0.2300	0.00	0
■	SOPRANO, CARMELA	GR24	0000	3	22.5000	1.00	0.2300	0.00	0
■	MELFI, JENNIFER	GR25	0003	3	24.5000	1.00	0.2500	0.00	0
■	DANTE, SILVIO	GR24	0002	4	21.6700	2.00	0.4400	0.00	0
■	LA CERVA, ADRIANA	GR26	0000	4	26.0000	2.00	0.5200	0.00	0

Planning Screen layout (described below from the top of the screen to bottom):

1. Note: The **Exempt and Non-Exempt** employees are shown on separate tabs. You can switch between both groups of employees by clicking either tab.

2. To view funds available for planning the merit increase, click on **Guideline**. As you plan you will see the amounts listed decrease as you make entries.

3. The **Export** button will export a spreadsheet showing all the employee info displayed in the planning worksheet.

4. The **Individual Planning** button will let you plan on an employee by employee basis.

5. The **Salary History** button will load an employee's salary history from SAP.

6. The **Check** column will display any warnings about the employee's record/planning. Green indicates employee is OK, yellow will indicate a non-hard stop warning and red will indicate a hard stop error exists. You can click on the color icon to view the actual status message.

Please note there is also sorting and filtering capability through the header and filter rows which are at the top of the worksheet.

To edit an employee's recommendation or rating take the following steps:

Manager Approval for Staff Merit Recommendations

Compensation Planning: Staff Review 2018 (Power User Mode), Step 2 (Plan Compensation)

Previous Next Save

1 2 3
Select Employees Plan Compensation Data Review and Submit

Manager: TOM KIRKMAN (BUWLT198)

Exempt Non-Exempt

Guideline

Staff Merit NonExempt

Office of ECM Administration 855.40 / 2,548.00 (USD) Remaining: 1,692.60 (USD)

Training Office 1,365.00 / 2,657.20 (USD) Remaining: 1,292.20 (USD)

Operations Office 455.00 / 1,346.80 (USD) Remaining: 891.80 (USD)

Communications Office 800.80 / 1,201.20 (USD) Remaining: 400.40 (USD)

View: Default Compensation ' Export Individual Planning Salary History

Check	Name	Grade	Prior Yr Rating	Curr Yr Rating	Curr Salary / Rate	Merit %	Merit Amt	Adj %	Ad
					0.01-99,999,999.00				
						1.9100			0.
	WRIGHT, SETH	GR24	0000	3	23.5499	1.00	0.2400	0.00	0
	DUNPHY, CLAIRE	GR24	0000	3	22.7500	1.00	0.2300	0.00	0
	SOPRANO, CARMELA	GR24	0000	3	22.5000	1.00	0.2300	0.00	0
	MELFI, JENNIFER	GR25	0003	3	24.5000	1.00	0.2500	0.00	0
	DANTE, SILVIO	GR24	0002	4	21.6700	2.00	0.4400	0.00	0
	LA CERVA, ADRIANA	GR26	0000	4	26.0000	2.00	0.5200	0.00	0

7. Enter/edit a **Current Year Rating** for employee between 1 & 5, this rating should be based off the employee's performance review. Only use 98/99 if the employee has no applicable rating or is too new to rate.

8. Enter/edit EITHER a **Merit %** OR **Merit Amt** and press enter. Once the sheet updates you will see the guideline decrease and also the new salary/rate column increase. Please note for exempt employees you are entering the total annual increase, for non-exempts you are entering just the increase to the current hourly rate.

9. If necessary, add/update a comment in the **Notes** field (e.g. the recommended increase is outside the guideline). These notes do not replace the performance review.

10. Check for any error messages under the **Check** column, if none exist move to the next employee.

Manager Approval for Staff Merit Recommendations

Compensation Planning: Staff Review 2018 (Power User Mode), Step 2 (Plan Compensation Data)

Previous Next **Save**

1 2 3
Select Employees Plan Compensation Data Review and Submit

Manager: TOM KIRKMAN (BUWLT198)

Exempt Non-Exempt

Guideline

Staff Merit NonExempt

Office of ECM Administration 855.40 / 2,548.00 (USD) Remaining: 1,692.60 (USD)

Training Office 1,365.00 / 2,657.20 (USD) Remaining: 1,292.20 (USD)

Operations Office 455.00 / 1,346.80 (USD) Remaining: 891.80 (USD)

Communications Office 800.80 / 1,201.20 (USD) Remaining: 400.40 (USD)

View: Default Compensation Export Individual Planning Salary History

Check	Name	Grade	Prior Yr Rating	Curr Yr Rating	Curr Salary / Rate	Merit %	Merit Amt	Adj %	Adj Amt
					0.01-99,999,999.00				
						1.9100	0.0000		
	WRIGHT, SETH	GR24	0000	3	23,5499	1.00	0.2400	0.00	0.0000
	DUNPHY, CLAIRE	GR24	0000	3	22,7500	1.00	0.2300	0.00	0.0000
	SOPRANO, CARMELA	GR24	0000	3	22,5000	1.00	0.2300	0.00	0.0000
	MELFI, JENNIFER	GR25	0003	3	24,5000	1.00	0.2500	0.00	0.0000
	DANTE, SILVIO	GR24	0002	4	21,6700	2.00	0.4400	0.00	0.0000
	LA CERVA, ADRIANA	GR26	0000	4	26,0000	2.00	0.5200	0.00	0.0000

Once you have completed planning for **both** exempt and non-exempt employees, press the **Save** button to save changes to the submitted org. Please note, since the org is in submitted status you will not be able to press the **Next** or **Review and Submit** buttons since the org is already submitted for review. After you save the planning you can then approve the org through the approval [overview screen](#) (page 2).