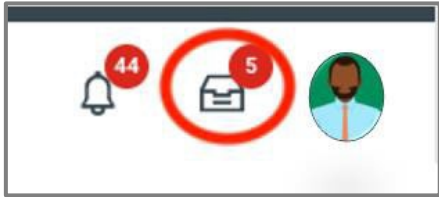



Getting Started: How to Complete the Merit Compensation Process (Managers)

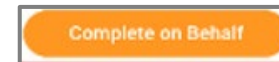
1. [Log in to USFWorks](#)
2. Click the **Inbox** icon on the home page.



3. Click the email titled **Compensation Review: Staff and Exec Merit Plan**. The **Overall Budget and Spend** page will open showing your Funded Merit Pool for your specific Org and Sub-Orgs.
4. If you have Sub Orgs, you will see an **Org Chart** icon . If you do not have Sub Orgs, your Overall Budget and Spend page will only display your direct reports. For either view, click on the **Pencil** icon under the **Propose** column to view your direct reports and to complete the Merit worksheet for each team member.
5. **IMPORTANT: Additional Adjustment** dollars are tied to the merit pool, which may cause you to go over budget. The system allows you to go over budget, but your Vice President/Dean and the President will have the final approval.
6. As a leader of leaders, you will have the ability to complete a sub-org's worksheet on that leader's behalf. Select the drop-down arrow next to **Actions** on that leader's row and select **Complete on Behalf**.



7. When selecting **Complete on Behalf**, the system will require you to **Confirm** the action and enter a **Comment** explaining why you are completing on behalf of your subordinate leader. Once done, click the **Complete on Behalf** button.



8. The **Pencil** icon will appear in the **View** column of the manager's org, giving you the ability to complete their merit worksheet for their employees.
9. Click the **Pencil** icon to start the merit proposal process.
10. The **Direct Reports Budget and Spend Summary** tab will open listing all employees under your direct supervision (or your subordinate leader's direct supervision if you are completing on their behalf).
11. Review the information carefully to ensure accuracy. If there are any questions or discrepancies, please email compensation@usfca.edu.
12. **Merit Increase Percent** is pre-populated at 0% for ALL employees. You are responsible for modifying the percentage based on the employee's performance, market, and other factors. The typical percentage increase range is 0% to 4%, with the average increase being 3%. You may edit the percent field from the Summary tab, but the preferred method is to make your proposals from the Merit tab.



Getting Started: How to Complete the Merit Compensation Process (Managers)











13. Click the **Merit** tab to make your proposals. When you edit the Merit Increase percent field, the corresponding Merit Amount field will automatically update. You have the option to propose a Market Adjustment if the employee is currently being paid below market rate.
14. Validations are built into the system which will require you to enter an explanation in the comments section if you propose an increase of less than 1%, 4% or higher, or total adjustments over 7%. The average merit percent increase is 3%.
15. Be sure to enter your explanation in the **Merit Increase Comments** field. Your explanation should explain why you are requesting an increase outside the common practices. Example: "I believe Mary should receive a 5% increase because she has exceeded all expectations and taken on additional work while we have been shorthanded".
16. If you are not proposing a merit increase for the employee, you will need to select **Yes** from the drop box in the **Merit Zero Increase** field.

-Employee-	Warnings	Merit Zero Increase
 Mary Johnson - Director I 01234567		No
 Amy Martin - Manager I 76543210		Yes

17. You also have the option for a **Lump-Sum payment** in lieu of an increase if the employee is already paid above the pay range maximum.
 - Market adjustments and lump-sum payments are tied into the merit pool, which may cause you to go over budget.
 - The system allows you to go over budget, but your Vice President/Dean and the President will have the final approval.

Summary		Merit			Total Award Percent	
Market Adjustment %	Market Adjustment \$	Market Adjustment Comments	Lump Sum \$	Lump Sum Comments	0.00	
0.00%	0.00		0.00		Time in Job Profile 2 year(s), 11 month(s), 30 day(s)	
0.00%	0.00		0.00		Pay Range - Midpoint 142,250.00	
0.00%	0.00		0.00		Total Base Pay Range 113,800.00 - 170,700.00 USD Annual	

18. Once all entries are complete, if there are no warning notifications, the **Submit** button will appear at the bottom left corner of the screen. Click **Submit** to send your proposals to the next level of your organization for review and approval.
 - **NOTE:** You will not be able to submit your proposals until all your sub-orgs have submitted their proposals to you. In this case, you will see a **Continue** button instead of a Submit button, which will bring you back to the top of your org.
19. Once your subordinate leaders submit their proposals to you for review, the status on their org will change to **Submitted**.

Organization	Sub Orgs	View	Activity	Status
 Vice President (Tony Butler)			<input type="checkbox"/>	Awaiting Action
 Director (Mary Johnson)				Manually Advanced
 Manager (Amber Martin)				Submitted

- To view their proposals, click on the pencil icon associated with their org. You can also click on **Actions** and select **View All Employees**.
- From the Merit tab, you can make changes to the leader's proposals by clicking on the **Merit Increase %** tab and change the percent amount. You can also do this in the **Adjustment Percent** field or the **Lump-Sum** field.
- Once you are done reviewing and making any necessary changes, click **Continue**.

Getting Started: How to Complete the Merit Compensation Process (Managers)

The screenshot shows a table with 14 items. The table has columns for Employee, Warnings, Merit Zero Increase, Primary Compensation Basis, Merit Target Percent, Merit Increase %, Merit Amount, and Merit Increase Comments. The 'Merit' tab is selected. A red box highlights the 'Merit Increase %' column for Andrew Day, which is 2.56%. A red arrow points to this value. A red box also highlights the 'Continue' button at the bottom left.

-Employee-	Warnings	Merit Zero Increase	Primary Compensation Basis	Merit Target Percent	Merit Increase %	Merit Amount	Merit Increase Comments
Andrew Day - Customer Support I 73226544		No	0	0.03	2.56%	1,581.00	
Brad Mason - Customer Support I 25439199		No	0	0.03	3.06%	1,980.00	
Lauren Banks - Customer Service Supervisor I 58794359		No	0	0.03	3.06%	2,393.73	

20. When all your subordinate leaders have submitted their proposals to you and you are done reviewing and editing all your sub-orgs, click the **Submit** button which will send your proposals to the next level of your organization for review and approval.

21. You will be notified via your Workday inbox that your proposals have been fully approved.

- Check the status of your submission by going to your Workday inbox and clicking the **Archive** tab.
- Select the email titled **Compensation Review: Staff and Exec Merit Plan** and click the **More Details** button. You will be able to see if your proposals were changed. You will use this information to communicate to your employees about their merit increase

