

Northwestern University	Salary Planning Procedures
Human Resources Information System	Procedures

## Staff Procedures – Table of Contents

### Using the Merit by SAU - Staff page

- Viewing Information
- Applying Approval
- Entering Evaluation Rating
- Entering Merit Increase:
  - Pct Increase
  - \$ Increase
  - New Comp Rate
  - New Annual Rate

### Using the Mass approval feature

### Using the Merit by Employee - Staff page

- Viewing Information
- Applying Approval
- Entering Evaluation Rating
- Entering Merit Increase:
  - Pct Increase
  - \$ Increase
  - New Comp Rate
  - New Annual Rate
- Extending Appointment End Date
- Extending Position End Dates

### Market Allocation

- Market Allocation Overview
- Market Allocation Eligibility
- How to enter a Market Allocation

## Using the Merit by SAU – Staff page

### Entering Information on the *Merit by SAU – Staff Page*

The *Merit by SAU - Staff* page is used for the data entry and approvals of merit increases by SAU for both monthly and bi-weekly staff. The following procedures should be followed to view and update the information on the *Merit by SAU – Staff* page.

#### Rules:

1. Only Staff may be viewed on the page.
2. Valid Salary Plans for the Staff page are EXS, ITS, EXC, NEX, and UPD.
3. This page has security, so you may only view employees with Salary Administration Units for which you have access.

### MERIT BY SAU - STAFF Viewing Information

Logon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- **Merit by SAU - Staff**

The Search page will be displayed.

Enter the **Salary Administration Unit** or **Salary Plan** that you would like to view.

Click Search.

A list of the SAUs and Salary Plans within the search criteria will appear in the Results box.

The screenshot shows the HRIS search interface. On the left is a 'Menu' with a search box and a list of categories including 'My Favorites', 'Self Service', 'Organizational Development', 'Payroll for North America', 'Workforce Administration', 'Benefits', 'Compensation', 'Base Compensation', 'Maintain Plans', 'Merit Increases', 'Merit by SAU - Staff', 'Merit by Employee - Staff', 'Merit by SAU - Faculty', 'Merit by Employee - Faculty', 'Reappointment - Faculty', 'Promotion - Faculty', and 'Salary Planning Reports'. The 'Merit by SAU - Staff' item is highlighted. The main search area is titled 'NW Merit by SAU - Staff' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. There are two search criteria fields: 'NW Salary Admin Unit:' with a dropdown menu set to 'begins with' and an empty text box; and 'Salary Administration Plan:' with a dropdown menu set to 'begins with' and an empty text box. A 'Correct History' checkbox is checked. At the bottom are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

### MERIT BY SAU - STAFF Applying Approval

Before the evaluation and Merit Increase are entered (whether *Pct Incr*, *\$ Incr*, *New Comp Rt*, or *New Annl Rt*) an appropriate approval must be applied.

Verify the name of the individual to whom you will be giving a Merit Increase.



Tab to the field marked *Merit Appr*.

Pull down the arrow and choose the appropriate approval level:

- P** - Planning,
- D** - Departments,
- N** - No Entry,
- R** - Rejected,
- Z** - Zero, or
- S** - School.

**Note:** If the employee is **not** eligible for a merit increase - choose the approval level **N** - *No Entry* or **Z** - *Zero* (if merit is not granted based upon performance), **R** - *Rejected* to close out the page.

This will assist you when running queries to check that all entries have been done.

Percent Increase		Dollar	
	<u>Merit Appr</u>	<u>Dept ID</u>	<u>Name</u>
1	<input type="text" value=""/> 	830000	Adams
2	<input type="text" value=""/> 	830000	Alvarez

## Entering Evaluation Rating – Loaded onto Job Data in HRIS

Tab to the *Eval* field and enter the ranking from your Performance Evaluation for the employee. The number cannot be less than 1 or greater than 7.

Use the following format: **X.XX**

To give the individual a "5", enter **5**. To give the individual a "4.25" evaluation rating, enter **4.25**.

**Please Note: When loaded into HRIS, the rate will round down to the nearest tenth. For example, 4.25 will display 4.20.**

Eval	Pct Incr	New Annl Rt	New FTE Sal
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

**The evaluation field will load into Job Data in HRIS with the Merit Increase load.**

## Merit by SAU – Staff header page

The following information is located in the header of the Merit by SAU – Staff page. Please see definitions for fields below:

SAU and Salary Plan are displayed in the first row.

**Goal Merit Increase % =**  
Proposed percentage increase to be given to the SAU and Salary Administration plan

**Goal Merit Increase \$=**  
Proposed sum of Dollar amount that can be distributed to employees within a SAU. See calculation below:

Goal Merit Inc \$ = total current salaries multiplied by Goal Merit % Increase.

Merit by SAU - Staff			
SAU:	444400	Sal Plan:	NEX
Goal Merit % Incr:	<input type="text" value="3.50"/>	Goal Market Alloc Pct:	<input type="text"/>
Goal Merit \$ Incr:	1,941.87	Goal Market Alloc Amt:	0.00
Total Merit % Incr:	0.00	Total Market Alloc Pct:	0.00
Total Merit \$ Incr:	0.00	Total Market Alloc Amt:	0.00
Total Merit Comparatio:		Total Combined Comparatio:	
		Total Current Salaries:	55,482.08
		Total New Salaries:	0.00
		Total Percent Increase:	0.00
		Total Amt Increase:	0.00

**Total Merit Increase % =**  
Percent increase of all employees combined within a SAU, after merit increase entry.

**Total Merit Increase \$ =** Sum of all dollar amount increases given to employees within a SAU (after merit increase entry).

**Total Merit Comparatio =**SAU comp ratio. Used to determine if a SAU is eligible for Market Allocation or not. See Market Allocation section.

Merit by SAU - Staff					
SAU:	444400	Sal Pln:	NEX		
Goal Merit % Incr:	<input type="text" value="3.50"/>	Goal Market Alloc Pct:	<input type="text" value=""/>	Total Current Salaries:	55,482.08
Goal Merit \$ Incr:	1,941.87	Goal Market Alloc Amt:	0.00	Total New Salaries:	57,423.92
Total Merit % Incr:	3.50	Total Market Alloc Pct:	0.00	Total Percent Increase:	3.50
Total Merit \$ Incr:	1,941.84	Total Market Alloc Amt:	0.00	Total Amt Increase:	1,941.84
Total Merit Comparatio:	0.87			Total Combined Comparatio:	0.87

**Goal Market Allocation Pct =**  
The proposed market allocation percentage to be given to eligible employees within an eligible SAU. This percentage is determined by the Compensation department.

**Goal Market Allocation Amt =**  
Goal Market Allocation Percent multiplied by total current salaries.

**Total Market Allocation Pct =**  
Total Market Allocation Amount increase divided by Total Current Salaries

**Total Market Allocation Amt =**  
Total Increase amount subtracted by total merit increase amount

Merit by SAU - Staff					
SAU:	444400	Sal Pln:	NEX		
Goal Merit % Incr:	<input type="text" value="3.50"/>	Goal Market Alloc Pct:	<input type="text" value="1.00"/>	Total Current Salaries:	55,482.08
Goal Merit \$ Incr:	1,941.87	Goal Market Alloc Amt:	554.82	Total New Salaries:	57,423.92
Total Merit % Incr:	3.50	Total Market Alloc Pct:	0.00	Total Percent Increase:	3.50
Total Merit \$ Incr:	1,941.84	Total Market Alloc Amt:	0.00	Total Amt Increase:	1,941.84
Total Merit Comparatio:	0.87			Total Combined Comparatio:	0.87

Merit by SAU - Staff					
SAU:	444400	Sal Pln:	NEX		
Goal Merit % Incr:	<input type="text" value="3.50"/>	Goal Market Alloc Pct:	<input type="text" value="1.00"/>	Total Current Salaries:	55,482.08
Goal Merit \$ Incr:	1,941.87	Goal Market Alloc Amt:	554.82	Total New Salaries:	57,970.71
Total Merit % Incr:	3.50	Total Market Alloc Pct:	0.99	Total Percent Increase:	4.49
Total Merit \$ Incr:	1,941.84	Total Market Alloc Amt:	546.79	Total Amt Increase:	2,488.63
Total Merit Comparatio:	0.87			Total Combined Comparatio:	0.87

**Total Current Salaries** = sum of all current annual salaries for all employees within the same SAU and Salary Plan

**Total New Salaries** = sum of all new annual salaries for all employees within the same SAU and Salary Plan (after entry of merit increases and market allocations if applicable).

**Total Percent Increase** = Total Merit % Inc plus Total Market Alloc Pct.

**Total Amt Increase** = Total Merit \$ Inc plus Total Market Alloc Amt

Total Combined Comparatio= SAU comp ratio including Merit and Market Allocation increases.

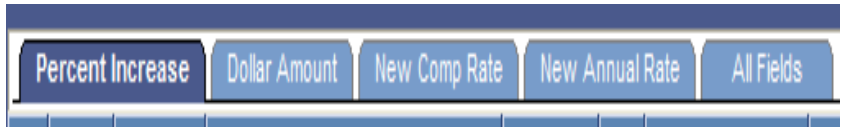
Merit by SAU - Staff					
SAU:	444400	Sal Pln:	NEX		
Goal Merit % Incr:	3.50	Goal Market Alloc Pct:	1.00	Total Current Salaries:	55,482.08
Goal Merit \$ Incr:	1,941.87	Goal Market Alloc Amt:	554.82	Total New Salaries:	57,970.71
Total Merit % Incr:	3.50	Total Market Alloc Pct:	0.99	Total Percent Increase:	4.49
Total Merit \$ Incr:	1,941.84	Total Market Alloc Amt:	546.79	Total Amt Increase:	2,488.63
Total Merit Comparatio:	0.87			Total Combined Comparatio:	0.87

### Page Layout

Select tabs to view the Salary Planning page depending on the driving factor used for the increase.

Each tab will display fields of information corresponding to the tab's heading.

To view all fields at one time, select *All Fields* tab.



### Percent Increase tab

\* *Make sure you are in Correction Mode.*

Enter the total Percent Merit Increase for the individual using the following format:

4.5 for 4.50

By pressing tab after entering the percent increase, the *NW Annual Rate* and *New FTE Salary* will be automatically updated to reflect the increase.

You can also use *New Annual Rate* to input increase information within this tab.

CUSTOMIZE | FIND | VIEW ALL | FIRST | 12 of 2

Percent Increase | Dollar Amount | New Comp Rate | New Annual Rate | All Fields

Merit Appr	Dept ID	Name	ID	Grd	Comp Rt	Annl Rt	Eval	Merit Pct Incr	Merit Annl Rt	Merit Incr Comparatio	New Annl Rt	New FTE Salary
1	P	Q	272502	Campus,Cynthia	1042408	9	13.730000	26,876.48				
2	P	Q	277702	Purple,John	1055279	9	13.700000	28,605.60				

**OR**

**Dollar Amount tab**

*\*Make sure you are in correction mode.*

Enter the total dollar amount of Merit Increase by which you are increasing either the monthly or hourly rate – depending on the paygroup of the selected employee.

*Example:* Enter 1.10 to give a bi-weekly employee an additional \$1.10 per hr.

*Example:* Enter 100 to give a monthly employee an additional \$100.00 per mo.

By pressing tab after entering dollar increase *Pct Inc*, *New Comp Rt*, *New FTE Sal* will be automatically updated to reflect the increase.

You can also use *Pct Increase* and/or *New Comp Rate* to input increase information within this tab.

**OR**

Salary Planning Procedures												
Dollar Amount												
New Annual Rate												
All Fields												
Name	ID	Grd	Comp Rt	Annlt Rt	Eval	Merit \$ Incr	Merit Comp Rt	Merit Pct Incr	Merit Iner Comparatio	New Comp Rate	New FTE Salary	
Campus,Cynthia	1042408	9	13.730000	26,876.48								
Purple,John	1055279	9	13.700000	28,605.60								

**New Comp Rate tab**

*\*Make sure you are in correction mode.*

Enter the total amount of Merit Increase for the individual expressed as a new hourly/monthly compensation rate in dollars.

*Biweekly Example:* Enter 15.20 to give a bi-weekly employee an hourly compensation rate of \$15.20

*Monthly Example:* Enter 2300 to give a monthly employee a monthly compensation rate of \$2,300.

By pressing tab after entering a new compensation rate, *Pct Incr* and *New FTE Sal* will be automatically updated to reflect the increase.

You can also use *Pct Increase* to input increase information within this tab.

**OR**

Submenu   Home   Help   Print   Exit									
New Comp Rate   New Annual Rate   All Fields									
	ID	Grd	Comp Rt	Merit Comp Rt	Eval	Merit Pct Incr	Merit Incr Comparatio	New Comp Rt	New FTE Salary
ia	1042408	9	13.730000	<input type="text"/>	<input type="text"/>	<input type="text"/>			
	1055279	9	13.700000	<input type="text"/>	<input type="text"/>	<input type="text"/>			

### New Annual Rate tab

Enter the total amount of Merit Increase for the individual expressed as a new annual rate in dollars

Ex: Enter 23,000 to give a biweekly/ monthly employee an annual compensation rate of \$23,000.

By pressing tab after entering the *New Annl Rate*, *Pct Incr*, and *New FTE Sal* will be automatically updated to reflect the increase.

The New Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid biweekly or monthly.

You can also use *Pct Increase* to input increase information within this tab.

Customize   Find   View All   First   1-2 of 4								
New Annual Rate		All Fields						
ID	Grd	Annl Rt	Merit Annl Rate	Eval	Merit Pct Incr	Merit Incr Comparatio	New Annl Rt	New FTE Salary
1042408	9	26,876.48	<input type="text"/>	<input type="text"/>	<input type="text"/>			
1055279	9	28,605.60	<input type="text"/>	<input type="text"/>	<input type="text"/>			

**All Fields tab**

Use the All Fields tab to enter data in any of the four fields and view every field for an employee at one time:

- Percent Increase
- Dollar Amount
- New Comp Rate
- New Annual Rate

After the merit increase is entered for the SAU and if the employee is eligible for a Market Allocation:

From the All Fields tab, enter the market allocation by % or by \$ amount for the eligible employee(s).

All Fields															
	Merit Pct Incr	Merit \$ Incr	Merit Comp Rt	Merit Annual Rate	Eval	Merit Incr Comparatio	Market Alloc % Incr	Market Alloc \$ Incr	Combined Comparatio	Total Pct Incr	Total \$ Incr	New Comp Rt	New Annl Rt	FTE Sal	New FTE Sal
1.48	3.50	0.48	14.21	27,816.08	5.00	0.87			0.87	3.50	0.480000	14.21	27816.08	26,876.48	27,816.08
1.60	3.50	0.48	14.18	29,607.84	5.00	0.86			0.86	3.50	0.480000	14.18	29607.84	26,817.75	27,757.35

**Save**

Click the Save button.



## Ability to Mass Approve Data Entry

Users have the ability to mass approve data entry on any Salary Planning panels that contain a grid. The following Salary Planning panels contain a grid:

- Merit by SAU – Faculty & Staff
- Reappointment – Faculty
- Promotion – Faculty
- Salary Readjustment – Faculty

Step	Action
	For example, using the Merit by SAU – Staff panel, merit increases were entered for employees within one SAU.
1.	Apply the appropriate approval level by entering a value into the <b>Mass Merit Approval</b> field. The values are: A – Administration ( <b>used by Compensation</b> ), D-Departments, N-No Entry, P – Planning, R- Rejected, Z-Zero or S-School <div style="border: 1px solid black; padding: 5px; width: fit-content;">           Mass Merit Approval: <input type="text"/> <input type="button" value="Approve"/> </div>

**Merit by SAU - Staff**

SAU: 444400    Sal Pln: NEX

Goal Merit % Incr: <input type="text" value="3.50"/>	Goal Market Alloc Pct: <input type="text" value="1.00"/>	Total Current Salaries: 55,482.08
Goal Merit \$ Incr: 1,941.87	Goal Market Alloc Amt: 554.82	Total New Salaries: 57,423.92
Total Merit % Incr: 3.50	Total Market Alloc Pct: 0.00	Total Percent Increase: 3.50
Total Merit \$ Incr: 1,941.84	Total Market Alloc Amt: 0.00	Total Amt Increase: 1,941.84
Total Merit Comparatio: 0.87		Total Combined Comparatio: 0.87

Custom

	Merit Appr	Dept ID	Name	ID	Grd	Comp Rt	Annl Rt	Eval	Merit Pct Incr	Merit Annl Rt	M C
1	<input type="text" value="P"/>	272502	Campus,Cynthia	1042408	9	13.730000	26,876.48	5.00	3.50	27,816.08	
2	<input type="text" value="P"/>	277702	Purple,John	1055279	9	13.700000	28,605.60	5.00	3.50	29,607.84	

Mass Merit Approval

Step	Action
2.	Once a Merit Approval letter is entered, click the yellow <b>Approve</b> button to apply the approval letter to <b>ALL</b> rows within the grid.
3.	Be sure to click the yellow <b>Save</b> button to save these approval level changes.

**Merit by SAU - Staff**

SAU: 444400      Sal Pln: NEX

Goal Merit % Incr:       Goal Market Alloc Pct:       Total Current Salaries: 55,482.08

Goal Merit \$ Incr: 1,941.87      Goal Market Alloc Amt: 554.82      Total New Salaries: 57,423.92

Total Merit % Incr: 3.50      Total Market Alloc Pct: 0.00      Total Percent Increase: 3.50

Total Merit \$ Incr: 1,941.84      Total Market Alloc Amt: 0.00      Total Amt Increase: 1,941.84

Total Merit Comparatio: 0.87      Total Combined Comparatio: 0.87

[Customize](#) | [Find](#) | [View](#)

Percent Increase		Dollar Amount	New Comp Rate	New Annual Rate	All Fields						
Merit Appr	Dept ID	Name	ID	Grd	Comp Rt	Annl Rt	Eval	Merit Pct Incr	Merit Annl Rt	Merit Incr Comparatio	
1	<input type="text" value="S"/> <input type="text" value="Q"/>	272502	Campus,Cynthia	1042408	9	13.730000	26,876.48	5.00	3.50	27,816.08	0.87
2	<input type="text" value="S"/> <input type="text" value="Q"/>	277702	Purple,John	1055279	9	13.700000	28,605.60	5.00	3.50	29,607.84	0.86

Mass Merit Approval

Northwestern University	Salary Planning Procedures
Human Resources Information System	Procedures

## Using the *Merit by Employee – Staff* Page

The *Merit by Employee - Staff* page only allows data entry for one individual at a time.

*Merit by SAU – Staff* page should be used for multiple data entries.

### Rules:

1. Only Staff may be viewed on the page.
2. Valid Salary Plans for the Staff page are EXS, ITS, EXC, NEX, and UPD.
3. This page has security, so you may only view employees with Salary Administration Units for which you have access.

## MERIT BY EMPLOYEE - STAFF Viewing Information

Lagon to HRIS

- Compensation
- Base Compensation
- Merit Increases
- **Merit by Employee - Staff**

The Search page will be displayed.

Enter the **Name** or **Employee ID** of the Staff member you would like to view.

You can also choose to view information using the *NW Salary Admin Unit* or the *Salary Administration Plan* criteria.

Click Search.

A list of the employees within the search criteria will appear alphabetically in the Results box. Select the employee that you would like to view by clicking on the desired line.

The screenshot displays the 'NW Merit by Employee - Staff' search page. On the left is a 'Menu' with a search box and a list of navigation options. The 'Merit by Employee - Staff' option is highlighted. The main content area is titled 'NW Merit by Employee - Staff' and contains a search form. The form includes a 'Find an Existing Value' button and four search criteria: 'Name', 'EmplID', 'NW Salary Admin Unit', and 'Salary Administration Plan'. Each criterion has a 'begins with' dropdown menu and an adjacent text input field. Below the input fields are checkboxes for 'Correct History' and 'Case Sensitive'. At the bottom of the form are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

## MERIT BY EMPLOYEE - STAFF Applying Approval

Before the Evaluation and Merit Increase are entered (whether *Pct Incr*, *\$ Incr*, *New Comp Rt*, or *New Annl Rt*) an appropriate approval must be applied.

Tab to the field marked *Merit Appr*.

Pull down the arrow and choose the appropriate approval level:

- P** - Planning,
- D** - Departments,
- N** - No Entry,
- R** - Rejected,
- Z** - Zero, or
- S** - School.

**Note:** If the employee is **not** eligible for a merit increase - choose the approval level **N** - *No Entry* or **Z** - Zero (if merit is not granted based upon performance), **R** - *Rejected* to close out the page.

This will assist you when running queries to check that all entries have been done.

The screenshot shows a window titled "Merit Increase". It contains two fields: "Merit Appr:" and "Pct Incr:". The "Merit Appr:" field has a dropdown menu open, showing the letter "P" and a magnifying glass icon. The "Pct Incr:" field is empty.

### Entering Evaluation Rating – Loaded onto Job Data in HRIS

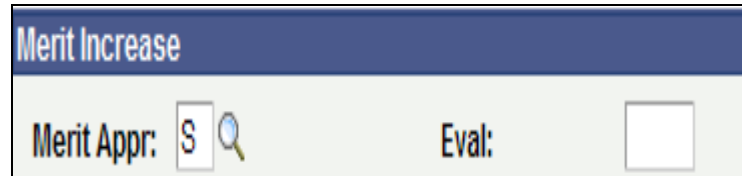
Verify that you have the correct employee on the page.

Tab to the *Eval* field and enter your ranking from the Performance Evaluation for the employee. The number cannot be less than 1 or greater than 7.

Use the following format: **X.XX**

Ex: To give the individual a "5", enter **5**. To give the individual a "4.25" evaluation, enter **4.25**.

**Please Note: When loaded into HRIS, the rate will round down to the nearest tenth. For example, 4.25 will display 4.20.**



The screenshot shows a form titled "Merit Increase". Below the title, there are two input fields. The first is labeled "Merit Appr:" followed by a dollar sign (\$) and a magnifying glass icon. The second is labeled "Eval:" followed by an empty text input box.

**The evaluation field will load into Job Data in HRIS with the Merit Increase load.**

## MERIT BY EMPLOYEE - STAFF

Merit Increases for Staff may be done in one of four ways - by entering a percent value for the increase, a dollar value for the increase, an hourly/monthly compensation rate, or an annual rate.

If eligible, a market allocation can be entered for an employee on the Merit by Employee – Staff panel.

### Merit Increase by Percent Increase

Tab to the field marked **Pct Incr.**

Enter the total Percent of Merit Increase for the individual using the following format:

Ex: Enter 3.25 for a 3.25% Increase

After the *Pct Incr* is entered, tab once and *\$ Incr*, *New Comp Rt*, and *New Annl Rt* will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

### Save

Click the Save button.

**OR**

**Merit by Employee - Staff**

ID: 1042408    Name: Campus,Cynthia    SAU: 444400  
 Sal Pln: NEX    Std Hrs: 37.50    Grd: 9  
 Dept ID: 272502    Dept Name: WCAS Anthr    Posn End Dt:     Posn Indef End  
 Pos #: 00007153    Type: STF    Catg: NEX    New Posn End Dt:  <sup>BT</sup>     New Posn Indef End

---

**Merit Increase**

Merit Appr:      Eval:     Comment:

Ben Elg: Y    Merit Pct Incr:     Market Alloc Pct:     Total Pct Incr: 0.00  
 Pct FT:    Merit \$ Incr:     Market Alloc Amt:     Total \$ Incr:  
 Comp Rt: 13.730000    Merit Comp Rt:     New Comp Rt:  
 Annl Rt: 26,876.48    Merit Annl Rt:     New Annl Rt:  
 FTE Sal: 26,876.48    Merit Inc Comparatio: 0.00    Combined Comparatio: 0.00    New FTE Sal:

---

**Reappointment**

Reap Appr:      Appt End Dt:     Indef End    Tenure:  
 New Appt End:  <sup>BT</sup>     New Indef End    Cont Per: 0

---

**Promotion**

Prom Appr: P    Job Cd: 100093    Job Title: Sectry 1  
 New Job Cd:    New Job Title:



### Merit Increase by Dollar Increase

Tab to the field marked **\$ Incr.**

Enter the total amount of Merit Increase for the individual expressed as a dollar amount.

Ex: Enter *1.35* to give a bi-weekly employee an additional \$1.35 per hour.

Ex: Enter *100* to give a monthly employee an additional \$100.00 per month.

After the **\$ Incr** is entered, tab once and **Pct Incr**, **New Comp Rt**, **New FTE Salary** and **New Annl Rt**, will be automatically updated to reflect the increase.

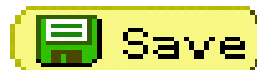
Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

### Save

Click the Save button.

**OR**

Merit by Employee - Staff			
ID:	1042408	Name:	Campus,Cynthia
SAU:	444400		
Sal Pln:	NEX	Std Hrs:	37.50
Grd:	9		
Dept ID:	272502	Dept Name:	WCAS Anthr
Posn End Dt:			
Pos #:	00007153	Type:	STF
Catg:	NEX	New Posn End Dt:	<input type="text"/>
		<input checked="" type="checkbox"/>	Posn Indef End
		<input type="checkbox"/>	New Posn Indef End
Merit Increase			
Merit Appr:	<input type="text"/>	Eval:	<input type="text"/>
Comment:	<input type="text"/>		
Ben Elg:	Y	Merit Pct Incr:	<input type="text"/>
Market Alloc Pct:	<input type="text"/>	Total Pct Incr:	0.00
Pct FT:		Merit \$ Incr:	<input type="text"/>
Market Alloc Amt:	<input type="text"/>	Total \$ Incr:	
Comp Rt:	13.730000	Merit Comp Rt:	<input type="text"/>
New Comp Rt:			
Annl Rt:	26,876.48	Merit Annl Rt:	<input type="text"/>
New Annl Rt:			
FTE Sal:	26,876.48	Merit Inc Comparatio:	0.00
Combined Comparatio:	0.00		New FTE Sal:
Reappointment			
Reap Appr:	<input type="text"/>	Appt End Dt:	<input type="text"/>
		<input checked="" type="checkbox"/>	Indef End
		<input type="checkbox"/>	New Indef End
Tenure:			
New Appt End:	<input type="text"/>	Cont Per:	0
Promotion			
Prom Appr:	P	Job Cdt:	100093
		Job Title:	Secrty 1
		New Job Cdt:	
		New Job Title:	
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>			



### Merit Increase by New Compensation Rate

Tab to the field marked **New Comp Rt.**

Enter the total amount of Merit Increase for the individual expressed as a new hourly or monthly amount.

*Biweekly Example:* Enter 15.20 to give a bi-weekly employee an hourly compensation rate of \$15.20.

*Monthly Example:* Enter 2300 to give a monthly employee a monthly compensation rate of \$2,300.

After the *New Comp Rt* is entered, tab once and *Pct Incr*, *\$ Incr*, *New Annl Rt*, and *New FTE Sal* will be automatically updated to reflect the increase.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

### Save

Click the Save button.

**OR**

Merit by Employee - Staff							
ID:	1042408	Name:	Campus,Cynthia	SAU:	444400		
Sal Pln:	NEX	Std Hrs:	37.50	Grd:	9		
Dept ID:	272502	Dept Name:	WCAS Anthr	Posn End Dt:		<input checked="" type="checkbox"/>	Posn Indef End
Pos #:	00007153	Type:	STF	Catg:	NEX	New Posn End Dt:	<input type="text"/>
<input type="checkbox"/> New Posn Indef End							
Merit Increase							
Merit Appr:	<input type="text"/>	Eval:	<input type="text"/>	Comment:	<input type="text"/>		
Ben Elg:	Y	Merit Pct Incr:	<input type="text"/>	Market Alloc Pct:	<input type="text"/>	Total Pct Incr:	0.00
Pct FT:		Merit \$ Incr:	<input type="text"/>	Market Alloc Amt:	<input type="text"/>	Total \$ Incr:	
Comp Rt:	13.730000	Merit Comp Rt:	<input type="text"/>	New Comp Rt:			
Annl Rt:	26,876.48	Merit Annl Rt:	<input type="text"/>	New Annl Rt:			
FTE Sal:	26,876.48	Merit Inc Comparatio:	0.00	Combined Comparatio:	0.00	New FTE Sal:	
Reappointment							
Reap Appr:	<input type="text"/>	Appt End Dt:		<input checked="" type="checkbox"/>	Indef End	Tenure:	
		New Appt End:	<input type="text"/>	<input type="checkbox"/>	New Indef End	Cont Per:	0
Promotion							
Prom Appr:	P	Job Cd:	100093	Job Title:	Secrty 1		
		New Job Cd:		New Job Title:			
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>							



### Merit Increase by Entering New Annual Rate

Tab to the field marked **New Annl Rt.**

Enter total amount of Merit Increase for the individual expressed as a new annual rate in dollars.

Ex: Enter 36500 to give a monthly employee an annual compensation rate of \$36,500.

After the *New Annl Rt* is entered, tab once and *Pct Inc*, *New Comp Rt*, *\$ Incr*, and *New FTE Sal* will be automatically updated to reflect the increase.

The New Annual Rate may change slightly from the amount entered after you tab out of the field. This is due to the system rounding the annual salary to an amount that can be paid biweekly or monthly.

Tab over to the comment field to add a comment. There is a 30-character maximum on this field.

### Save

Click the Save button.

**OR**

Merit by Employee - Staff								
ID:	1042408	Name:	Campus,Cynthia	SAU:	444400			
Sal Pln:	NEX	Std Hrs:	37.50	Grd:	9			
Dept ID:	272502	Dept Name:	WCAS Anthr	Posn End Dt:		<input checked="" type="checkbox"/> Posn Indef End		
Pos #:	00007153	Type:	STF	Catg:	NEX	New Posn End Dt:		<input type="checkbox"/> New Posn Indef End
Merit Increase								
Merit Appr:	P	Eval:		Comment:				
Ben Elg:	Y	Merit Pct Incr:		Market Alloc Pct:		Total Pct Incr:	0.00	
Pct FT:		Merit \$ Incr:		Market Alloc Amt:		Total \$ Incr:		
Comp Rt:	13.730000	Merit Comp Rt:		New Comp Rt:				
Annl Rt:	26,876.48	Merit Annl Rt:		New Annl Rt:				
FTE Sal:	26,876.48	Merit Inc Comparison:	0.00	Combined Comparison:	0.00	New FTE Sal:		
Reappointment								
Reap Appr:	P	Appt End Dt:		<input checked="" type="checkbox"/> Indef End	Tenure:			
		New Appt End:		<input type="checkbox"/> New Indef End	Cont Per:	0		
Promotion								
Prom Appr:	P	Job Cd:	100093	Job Title:	Secrty 1			
		New Job Cd:		New Job Title:				
Save Return to Search Previous in List Next in List Notify Include History Correct History								



## Extending Appointment End Date and Position End Date

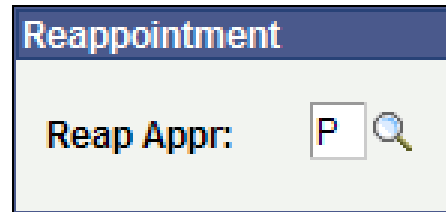
### Applying Reappointment Approval

Before the reappointment has been entered, the appropriate approval must be applied.

Tab to the field marked *Reap Approval*.

Pull down the arrow and choose the appropriate approval level:

- P** – Planning,
- D** – Departments,
- N** – No Entry,
- R** – Rejected, or
- S** – School.



### EXTENDING APPT END DATE

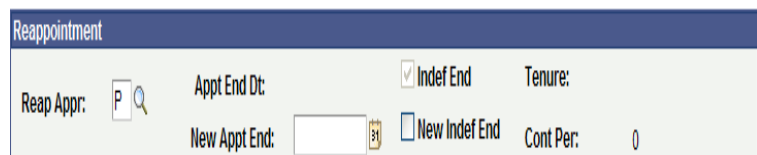
To extend Staff appointments, tab to the *New Appt End* field and type in the new appointment end date, using the following date format:

04/30/2009 mm/dd/yyyy

If the new end date is indefinite, click the checkbox marked *New Indef End*.

Position end date must be equal to or greater than the *New Appt End* date.

If you make the appointment indefinite (*New Indef End*) then either the *New Posn Indef End* box or the *Posn Indef End* box in the page header must be checked.



### EXTENDING POSITION END DATE

To extend Staff position end date, tab to the *New Posn End Dt* field in the page header and type in the *New Posn End Dt*, using the following date format:

Mm/dd/yyyy - 04/30/2009

If the new position end date is indefinite, click the checkbox marked *New Posn Indef End*.

Posn End Dt:	<input type="text"/>	<input checked="" type="checkbox"/> Posn Indef End
New Posn End Dt:	<input type="text"/> 	<input type="checkbox"/> New Posn Indef End

### Save

Click the Save button.



Northwestern University	Salary Planning Procedures
Human Resources Information System	Procedures

## Market Allocation Overview

The Market Allocation capability is *only* available for staff, if eligible. Before possible Market Allocations can be given, merit increases must be entered for all staff within an SAU. See the rules below for Market Allocation eligibility.

Market Allocations will be entered by using one of the following panels:

- Merit by SAU – Staff
- Merit by Employee – Staff

### Market Allocation Eligibility Rules:

After **all** merit increase decisions have been entered for an SAU, users may enter a Market Allocation for eligible employees if the following conditions are met:

1. The SAU's Total Merit Increase Compratio field is under 1.00 (after entry of merit increases).
2. The employee's Merit Increase Comp Ratio must be under 1.00 (after entry of merit increase).

**Then the employee is eligible for a Market Allocation.**

### Verify SAU Eligibility

Enter all merit increases for that SAU

Look at the **Total Merit Increase Compratio** field (found in the header of the Merit by SAU – Staff panel)

Under 1.0 – SAU is eligible  
1.0 or over – SAU is not eligible

Merit by SAU - Staff			
SAU:	444400	Sal Pln:	NEX
Goal Merit % Incr:	<input type="text" value="3.50"/>	Goal Ma	
Goal Merit \$ Incr:	1,941.87	Goal Ma	
Total Merit % Incr:	3.50	Total M	
Total Merit \$ Incr:	1,941.84	Total M	
Total Merit Comparatio:	0.87		

### Verify Employee's Eligibility

On the All Fields tab in the Merit by SAU – Staff panel, scroll to the right.

Look at the **Merit Inc Comp Ratio** field

- If the field is 1.0 or over → the employee is not eligible for the Market Allocation
- If the field is under 1.0 → the employee is eligible for the Market Allocation

All Fields									
	Merit Pct Incr	Merit \$ Incr	Merit Comp Rt	Merit Annual Rate	Eval	Merit Incr Comparatio	Market Alloc % Incr	Market Alloc \$ Incr	Combined Comparatio
1.48	3.50	0.48	14.21	27,816.08	5.00	0.87			0.87
1.60	3.50	0.48	14.18	29,607.84	5.00	0.86			0.86

### Enter Market Allocation (if eligible)

If all the Market Allocation conditions have been met, enter the employee's Market Allocation in one of two ways:

- Market Allocation % Increase
- Market Allocation Dollar Incr

The Market Allocation can be entered on the following pages:

- Merit by SAU – Staff
- Merit by Employee – Staff

### Enter Market Allocation using the Merit by SAU – Staff panel

#### Enter Market Allocation by percent Increase

\* Make sure you are in Correction Mode.

Enter the total Market Allocation Percent Increase for the individual using the following format:

1.5 for 1.50

By pressing tab after entering the percent increase, the *Market Allocation \$ Incr* automatically updated to reflect the increase.

All Fields									
	Merit Pct Incr	Merit \$ Incr	Merit Comp Rt	Merit Annual Rate	Eval	Merit Incr Comparatio	Market Alloc % Incr	Market Alloc \$ Incr	Combined Comparatio
.48	3.50	0.48	14.21	27,816.08	5.00	0.87			0.87
.60	3.50	0.48	14.18	29,607.84	5.00	0.86			0.86

#### Save

Click the Save button.



OR

**Enter Market Allocation by Dollar Amount**

Enter the total amount of Market Allocation for the individual expressed as a dollar amount.

Ex: Enter 1.35 to give a bi-weekly employee an additional \$1.35 per hour.

Ex: Enter 20 to give a monthly employee an additional \$20.00 per month.

After the Market Alloc \$ Incr is entered, tab once and the Market Alloc % Incr field, will be automatically updated to reflect the increase.

All Fields									
	Merit Pct Incr	Merit \$ Incr	Merit Comp Rt	Merit Annual Rate	Eval	Merit Incr Comparatio	Market Alloc % Incr	Market Alloc \$ Incr	Combined Comparatio
.48	3.50	0.48	14.21	27,816.08	5.00	0.87			0.87
.60	3.50	0.48	14.18	29,607.84	5.00	0.86			0.86

**Save**

Click the Save button.



OR

### Enter Market Allocation using the Merit by Employee – Staff panel

#### Enter Market Allocation by percent Increase

\* Make sure you are in Correction Mode.

Enter the total Market Allocation Percent Increase for the individual using the following format:

1.5 for 1.50

By pressing tab after entering the percent increase, the *Market Allocation \$ Incr* automatically updated to reflect the increase.

**Merit by Employee - Staff**

ID: 1042408    Name: Campus,Cynthia    SAU: 444400

Sal Pm: NEX    Std Hrs: 37.50    Grd: 9

Dept ID: 272502    Dept Name: WCAS Anthr    Posn End Dt:  Posn Indef End

Pos #: 00007153    Type: STF    Catg: NEX    New Posn End Dt:   New Posn Indef End

---

**Merit Increase**

Merit Appr:  S     Eval:  5.00    Comment:

Ben Elg: Y    Merit Pct Incr:  3.50    Market Alloc Pct:     Total Pct Incr: 3.50

Pct FT:    Merit \$ Incr:  0.48    Market Alloc Amt:     Total \$ Incr: 0.480000

Comp Rt: 13.730000    Merit Comp Rt:  14.21    New Comp Rt: 14.21

Annl Rt: 26,876.48    Merit Annl Rt:  27816.08    New Annl Rt: 27,816.08

FTE Sal: 26,876.48    Merit Inc Comparatio: 0.87    Combined Comparatio: 0.87    New FTE Sal: 27,816.08

---

**Reappointment**

Reap Appr:  P     Appt End Dt:      Indef End    Tenure:

New Appt End:   New Indef End    Cont Per: 0

#### Save

Click the Save button.



OR

**Enter Market Allocation using the Merit by Employee – Staff panel**

**Enter Market Allocation by Dollar Amount**

Enter the total amount of Market Allocation for the individual expressed as a dollar amount.

Ex: Enter 1.35 to give a bi-weekly employee an additional \$1.35 per hour.

Ex: Enter 20 to give a monthly employee an additional \$20.00 per month.

After the Market Alloc \$ Amt is entered, tab once and the *Market Alloc % Incr field*, will be automatically updated to reflect the increase.

Merit by Employee - Staff			
ID:	1042408	Name:	Campus,Cynthia
SAU:	444400		
Sal Pln:	NEX	Std Hrs:	37.50
Grd:	9		
Dept ID:	272502	Dept Name:	WCAS Anthr
Posn End Dt:	<input type="checkbox"/> Posn Indef End		
Pos #:	00007153	Type:	STF
Catg:	NEX	New Posn End Dt:	<input type="text"/> <input type="button" value="BT"/>
<input type="checkbox"/> New Posn Indef End			
Merit Increase			
Merit Appr:	<input type="text"/> <input type="button" value="S"/> <input type="button" value="Q"/>	Eval:	<input type="text"/> 5.00
Comment:	<input type="text"/>		
Ben Elg:	Y	Merit Pct Incr:	<input type="text"/> 3.50
Market Alloc Pct:	<input type="text"/>	Total Pct Incr:	3.50
Pct FT:		Merit \$ Incr:	<input type="text"/> 0.48
Market Alloc Amt:	<input type="text"/>	Total \$ Incr:	0.480000
Comp Rt:	13.730000	Merit Comp Rt:	<input type="text"/> 14.21
New Comp Rt:	14.21		
Annl Rt:	26,876.48	Merit Annl Rt:	<input type="text"/> 27816.08
New Annl Rt:	27,816.08		
FTE Sal:	26,876.48	Merit Inc Comparatio:	0.87
Combined Comparatio:	0.87		
New FTE Sal:	27,816.08		
Reappointment			
Reap Appr:	<input type="text"/> <input type="button" value="P"/> <input type="button" value="Q"/>	Appt End Dt:	<input type="text"/>
<input checked="" type="checkbox"/> Indef End	Tenure:		
<input type="checkbox"/> New Indef End	New Appt End:	<input type="text"/> <input type="button" value="BT"/>	Cont Per:
		0	

**Save**

Click the Save button.



OR