

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

UTHealth The University of Texas	Protected Resource
Health Science Center at Houston	The resource you are requesting requires authentication.
UTHealth Enterprise Password	Use your UTHealth username and password
Username	
Password	
🔒 Log in	

- > 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:
 - FY20XX Semi-Monthly Classified Merit Increase Plan—contains all classified employees that meet the eligibility requirements for December merits.
 - 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.



- 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'.

Workforce Com	pensation:	0	To view multiple plans, click on the arrow	Viewing plan 1 of 2
FY2020 Bi-Weekly Classified Me Status Budget Available 🐻 🖗	erit Plan FY2020 Last Approval Action None	Access Level Updates Allowed		Submit for Approval
Tasks The Manage Budgets Macate Compensation		je Approvals yee Statements	View reports	

c. Select 'Allocate Compensation' from the icons under 'Tasks' to view the merit worksheet for the plan you have selected.

Workforce Co	mpensation:	•		Viewing plan 1 of 2 📎
FY2020 Bi-Weekly Classified Status Budget Available 🛛 🐻 🚳	I Merit Plan FY2020 Last Approval Action None	Access Level Updates Allowed		Submit for Approval
Tasks Manage Budgets		ige Approvals oyee Statements	View reports	

> 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**.



FY2020 Semi	-Monthly Classified I	Merit Ir	ncrease Plan FY202	20			
Summary: D	Direct Reports						
Component							
Merit							
Lump Sum							
Actions 🔻	√iew ▼ Format ▼	Ŧ	📄 Detach 🛛 🎘	▼ ₹			
<	Tree Columns	₽	Detach 🔭 Current Annual Rate	∰ ▼ Current Annualized Salary	Performance Rating	Enterable Performance Rating	Manager Entered Merit %
<	Tree Columns Freeze		Current	Current Annualized Salary			Entered Merit
<	Tree Columns Freeze Detach	•	Current Annual Rate	Current Annualized Salary 137,253.94	Rating	Performance Rating	Entered Merit
<	Tree Columns Freeze Detach Sort		Current Annual Rate 142,057.83	Current Annualized Salary 137,253.94 146,648.74	Rating Exceeds Expe	Performance Rating	Entered Merit
Actions Employee I	Tree Columns Freeze Detach	•	Current Annual Rate 142,057.83 146,648.74	Current Annualized Salary 137,253.94 146,648.74 116,462.00	Rating Exceeds Expe Exceptional	Performance Rating	Entered Merit

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.

Employee ID	Employee Name	Current Annual Rate	Current Annualized Salary	Performance Rating
	•	55,000.00	55,000.00	Exceeds Expectat
	•	34,121.00	47,343.00	Not applicable
		89,412.00	89,412.00	Exceptional
	►	74,835.87	74,835.87	Exceptional
	►	37,311.75	37,311.75	Exceeds Expectat
	•	37,569.73	37,569.73	Exceeds Expecta
	►	51,555.47	51,555.47	Exceeds Expecta
	►	50,870.64	50,870.64	Not applicable
	►	36,689.81	36,689.81	Fully Meets Expe
	►	86,320.00	86,320.00	Exceptional



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.

Actions 🔻	View 🔻 Format 👻	Detach	- 理 🛠	
	List			Current
Employee I	Columns	►	Irrent Annual Rate	Annualized Salary
	Freeze			-
	Detach		55,000.00	55,000.00
	Expand		34,121.00	47,343.00
	Expand All Below		89,412.00	89,412.00
	Collapse All Below		74,835.87	74,835.87
	Expand All		37,311.75	37,311.75
	Collapse All		37,569.73	37,569.73
	Scroll to First	Ctrl+Home	51,555.47	E4 EEE 47
	Scroll to Last	Ctrl+End	51,555.47	51,555.47
	Sort	►	50,870.64	50,870.64
	Reorder Columns		36,689.81	36,689.81
	▶ 1		86,320.00	86,320.00
Page 1	of 3 (1-10 of 23 items)	I< < 1	2 3 > >	

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.



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.

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Allocate Compensation 📟				<u>S</u> ave an		<u>C</u> ancel
FY2020 Semi-Monthly Classified Merit Increase Plan FY2020			the Save button in			
Summary: All Workers		order to through	save your work out the process	5		×
Component	Currency	Employees With Compensation	Percentage of Employees Compensated	Compensation Amount	Overall Budget Amount	Merit Worksheet Budget Guide (3.0%)
Merit	USD	12	32	52,628.45	100,032.76	40,685.59
Lump Sum	USD	2	5	6,718.72		

> 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.



Employee ID	Employee Name	Current Annual Rate	Current Annualized Salary	Enterable Performance Rating	Performan	n the Enterable ce Rating drop /n menu source	, Alerts
	Þ	142,057.83	137,253.94 Exceeds Expe	×	5.00	Yes - No PA Req $ \smallsetminus $	
	4	146,648.74	146,648.74 Exceptional			~	Δ
	•	124,200.00	124,200.00 Exceptional	Exceptional	þ	Yes - No PA Req \smallsetminus	
	Fille	120,510.00	120,510.00 Exceeds Expe	Exceeds Expectations Fully Meets Expectations	D	~	
	•	113,712.00	113,712.00 Exceeds Expe	Improvement Needed	D	~	
	•	125,777.51	125,777.51 Exceptional	Unsatisfactory	þ	~	
	Þ	113,712.00	113,712.00 Exceeds Expe	Not Applicable	p	~	
	Þ	120,538.17	116,462.00 Exceeds Expe	Search		~	A
	•	97,871.21	97,871.21 Exceeds Expe	× -		~	A

- 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.

Employee ID	Employee Name	Current Annual Rate	Current Annualized Salary	Performance Rating	Enterable Performance Rating	Manager Entered Merit %	Will LSM have the same funding source?
	►	142,057.83	137,253.94	Exceeds Expe	~	5.00	Yes - No PA Req 🗸
	4	146,648.74	146,648.74	Exceptional	~		~
	Þ	124,200.00	124,200.00	Exceptional	Enter Merit	5.00	Yes - No PA Req ${\scriptstyle\checkmark}$
	Þ	120,510.00	120,510.00	Exceeds Expe	percentage in the Manager Entered	4.00	~
	Image: A start of the start	113,712.00	113,712.00	Exceeds Expe	Merit % column	3.00	~
	► International Action	125,777.51	125,777.51	Exceptional	~	4.00	~
	Þ	113,712.00	113,712.00	Exceeds Expe…	~	2.00	~
	•	120,538.17	116,462.00	Exceeds Expe…	~		~
	•	97,871.21	97,871.21	Exceeds Expe…	~		~
	•	92,959.56	92,959.56	Exceeds Expe	~		~

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.





➢ 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.

• 🎘 🎢 ▼									1
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	т
142,057.83	137,253.94	Exceeds Expe	~	5.00	Yes - No PA Req $ \smallsetminus $		10,598.06	1,308.72	
146,648.74	146,648.74	Exceptional	~		~	4	0.00	0.00	
124,200.00	124,200.00	Exceptional	~	5.00	Yes - No PA Req ${\scriptstyle\checkmark}$		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.

No - Submit a PA for funding change funding same funding source?" column. Only use this column if your employee is getting a lump sum merit. Yes - No PA Required 10,598.06 1,308.72 142,000.0 124,200.00 Exceeds Expe 0.00	Current nual Rate	Current Annualized Salary	Performance Rating	Enterable Perf Select Yes - No	Manage PA Required or		Alerts	Calculated Merit Amount Increase (\$)	Calculated Lump Sum Merit	٦
146,648.74 146,648.74 Exceptional Only use this column if your employee is getting a lump sum merit. 0.00 0.00 124,200.00 124,200.00 Exceptional Yes - No PA Required 800.00 5,410.00 120,510.00 120,510.00 Exceeds Expe ✓ 4.00 Search 4,820.40 0.00 113,712.00 Exceeds Expe ✓ 3.00 ✓ 3,411.36 0.00	42,057.83		Exceeds Expe	change in the "	Will LSM have the	Yes - No PA Req 🗸				
124,200.00 124,200.00 Exceptional Yes - No PA Required 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	46,648.74	146,648.74	Exceptional	Only use this	column if your			0.00	0.00	
120,510.00 120,510.00 Exceeds Expe 4.00 Search 3.411.36 0.00 113,712.00 113,712.00 Exceeds Expe 3.00 3.411.36 0.00	24,200.00	124,200.00	Exceptional	m		Yes - No PA Required		800.00	5,410.00	
113,712.00 113,712.00 Exceeds Expe V 3.00 3.00 3.411.36 0.00	20,510.00	120,510.00	Exceeds Expe	~	4.00		g change	4,820.40	0.00	
125,777.51 125,777.51 Exceptional V 4.00 V 5,031.10 0.00	13,712.00	113,712.00	Exceeds Expe	~	3.00			3,411.36	0.00	
	25,777.51	125,777.51	Exceptional	~	4.00			5,031.10	0.00	

- > 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.

				Compe	ensation	Compens
			USD		5	
Detach	≫ 理 ◄	the reaso	ver the alert to view on for the alert and w to resolve it)	2	
aung		ve Limit	6 limit. Please enter	Alerts	Calculate Merit Amou Increase (nt L
xceeds Expect	Exceptional	· · · · · · · · · · · · · · · · · · ·			Alert icon displayed the 'Alert	1 in
xceptional		5.00		0	columr	·

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

Allocate Compensation Pr2020 Semi-Monthly Classified Merit Increase Plan Pr2020		wor	lick here to save t ksheet. Do not su	he bmit	nd Close	Çancel
Summary: All Workers		<u> </u>	our worksheet ye			×
Component	Currency	Employees With Compensation	Percentage of Employees Compensated	Compensation Amount	Overall Budget Amount	Merit Worksheet Budget Guide (3.0%)
Merit	USD	12	32	52,628.45	100,032.76	40,685.59
Lump Sum	USD	2	5	6,718.72		
Actions ▼ View ▼ Format ▼ 📰 Detach 🏾 🎘 🏸 ▼						
	Will LSM have the same funding source	ce? Alerts	Calculated Merit Amount	Calculated Lump Sum		New Annual Rate

- 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.

Workforce Com	pensation:	•		Viewing plan 2 of 2
FY2020 Semi-Monthly Classifie Status Work in Progress 🛛 🗟 🕲	ed Merit Increase Plan FY2020 Last Approval Action None	Access Level Updates Allowed		Submit for Approval
Tasks Manage Budgets	🔅 Manage A	Cick Manage Approvals Ink	View reports	
Allocate Compensation	Employee	Statements		

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.



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.

Approvals Compensation Overview Allocation Statistics S	Salary Range Analysis Alerts	Click the drop down menu next to the Approve button	
Actions 🔻 View 🔻 Format 👻 🎵 💷 Freeze 📓 Detac	ch 🖉 Approve 🗸 🔊 Return	for Correction (1) Request Information	on
	Selected Managers		Manager's
Manager	All Managers	Access Level	Worksheet Status
Select All		Updates Allowed	Work in Progress
Managers		🖍 No Updates Allowed 🗸	Submitted
•		🔩 No Updates Allowed 🗸	Submitted
•		Updates Allowed	Budget Available

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 <u>will not</u> 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.

FY2020 Semi-Monthly Classified Merit Increase Plan FY2020							
Approvals Compensation Overview Allocation Statistics Salary	Range Analysis Alerts						
Actions ▼ View ▼ Format ▼ 3 5 5 Freeze S Detach	Approve Return for Correction B Request Information						
Manager		Manager's Worksheet Status					
1. Select (highlight) the manager's name	neutra Annaire and state	Work in Progress					
•	va ivo opuates Anowed ~	Submitted					
•	🔩 No Updates Allowed 🗸	Submitted					
•	Updates Allowed ~	Budget Available					

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 e on the upper left-hand corner of the screen and select **My Dashboard**. Then click on **Instructions for Merit Approvers.**



	·····································
/elcome,	This is your dashboard screen!
Merit Worksheet Merit Englishty and Goldsmarks (Merit Russ) Sector Sector Sect	Merit Reminders • Classified employees must have been hired, rehired, promoted, or received a merit on or prior to June 1, 2019 to be considered merit eligible. • The Executive Budget Committee has approved a 3.0% self-funded merit pool for classified employees. • Glassified employees may be awarded a merit from 0 + 5.0%. • Merit submitters and approves can export their merit worksheet to Excel. Click the Export to Excel icon on the merit worksheet. • Employee merit letters will be available for printing November 15 - December 15.
Lump Stem PASS Job Ald (Funding Source Changes Only)	

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.

Workforce Compe	ensation:	•	Click the Submi Approval butio submit to the new level for approv	n to ext
FY2020 Semi-Monthly Classified I	Merit Increase Plan FY2020			\leq
Status Work in Progress 🛛 🐻 🚳	Last Approval Action None	Access Level Updates Allowed		Submit for Approval
Tasks Manage Budgets Rillocate Compensation		Approvals o Statements	View reports	

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

Submit for App	proval
Details	
your manager ret	sheet for approval. You will not be able to make changes unless urns it for correction or you withdraw the submission. Your lower vill not be able to make changes or withdraw their worksheets.
Plan	FY2020 Semi-Monthly Classified Merit Increase Plan
Next Approver	Click Submit to route to the next level of approval Sub <u>m</u> it <u>Cancel</u>



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.

Workforce Com	pensation:	O		< Viewing plan 2 of 2
FY2020 Semi-Monthly Classifie Status Submitted 🐻 🕸	ed Merit Increase Plan FY2020 Last Approval Action None	Access Level No Updates Allowed		Withdraw
Tasks Manage Budgets	(C) Manage	Approvals	View reports	You may withdraw the submission of the worksheet if it has not yet been approved
Allocate Compensation	Employe	e Statements		