

Annual Merit – Manager of Managers

Overview

The Annual Merit process is used by managers to review the pay in their respective organizations, taking into consideration employees' performance and position in Salary range. Additionally, managers may propose merit increases through the process. Managers of Managers will also review and approve the merit recommendations made by their reports.

Who Does This: Managers of Managers

Things to Know:

- The Annual Merit process takes place each year in March.
- You will receive an inbox task for Merit once the process begins. This inbox task will allow you to propose merit increases for your direct reports as well as review and approve merit recommendations made by your reports.
- After you submit your Merit inbox task, your management chain will review your merit recommendations. If modifications are needed, they may be sent back to you for revisions.
- After the entire management chain has submitted the Merit inbox task, the merit recommendations are reviewed by Compensation for final approval.
- For more information on merit including guidance on making recommendations and more detail on the process in Workday, refer to the Merit and Compensation training on the Employee Resources intranet page under [Compensation Tools](#).



Inbox

Step 1

Choose the Inbox worklet.

Inbox

Actions (2)

Archive

Viewing: All

Sort By: Newest

Merit: 2018 Merit Cycle - USA for Steve Director

1 day(s) ago - Effective 04/16/2018



Step 2

Choose the inbox task: **Merit**.

Overall Budget and Spend



Merit
 USD
7,838.79
 of 10,376.18

Step 3

Review overall budget and spend. This will adjust as you and your direct and indirect reports enter merit recommendations.

Note: If the spend amount changes to red text, your merit recommendations exceed your merit budget.

The screenshot shows an inbox task for 'Organization Summary'. A blue arrow points to the maximize icon in the top right corner of the task card.

Note: Prior to completing the remaining steps, it may be helpful to expand the inbox task by selecting the maximize/minimize icon.

% of Pool Summary 1 item

Organization	Sub Orgs
Steve Director	

Step 4

Select the Sub Orgs icon to view the supervisory organizations that roll up to you.

Organization	View	Activity	Status	Employees	Merit	Actions
Steve Director			Awaiting Action	3	0.00%	Actions
John Manager			Awaiting Action	10	23.48%	Actions

Step 5

Review the organizations rolling up to you. For each organization, you will see the Status of the Merit task, the Employee Count, and the current spend relative to budget.

Organization	View
Steve Director	
John Manager	

Step 6

Under View, select the view icon to see Summary for all employees in an organization that rolls up to you.

Steve Director > John Manager

10 items Summary **Merit**

Step 7

Select the **Merit** tab for more detail.

This information will be updated as the manager of the organization makes changes. The information will be finalized once the manager submits his/her proposal.

Step 8

Use the activity stream to add comments (optional). Comments will be visible by your management chain, HR, and Compensation.

Step 9

Select **Continue**.

Organization	View
Steve Director	
John Manager	

Step 10

Select the pencil icon to view and edit merit proposals for your organization.

www.coorstek.com/workdayhelp/english
Under Additional Resources – For Managers

Step 11

Refer to the Annual Merit – Manager of Individual Contributors job aid Steps 4 – 21 to propose merit for your direct reports.

Once you have entered recommendations for each of your employees, continue with Step 12 below.

Step 12

Use the activity stream to add comments (optional). Comments will be visible by your management chain, HR, and Compensation.

Step 13

Select **Continue**.

Organization Summary: Merit: 2018 USA Mer

2 hour(s) ago - Effective 04/16/2018

Overall Budget and Spend



% of Pool Summary 1 item

Organization	Sub Orgs
Steve Director	

Submit

Step 14

Continue to monitor merit proposals for your subordinate supervisory organizations.

Organization	View	Activity	Status	Employees	Errors	Merit	Actions
Steve Director			Awaiting Action	3	1	65.31%	Actions
John Manager			Submitted	10	2	95.63%	Actions

Return to Top Level

Step 15

Under Activity, select the activity stream icon to see all activity and comments for the merit proposal for the organization.

Organization	View	Activity	Status	Employees	Errors	Merit	Actions
Steve Director			Awaiting Action	3	1	65.31%	Actions
John Manager			Submitted	10	2	95.63%	Actions

Return to Top Level

Step 16

Once the Status for an organization is Submitted, select the pencil icon to view and edit the merit proposal for the organization.

Steve Director > John Manager

10 items

Summary

Merit

Step 17

Select the **Merit** tab for more detail.

Employee	Current Rating	Errors / Warnings	Total Base Pay Amount	Merit Target Range	Merit Increase %	Base Pay Range
Don Employee Mechanic John Manager	Solid Performer		39,332.80	3 - 4 %	4.00%	18.50 - 24.50 USD Hourly
Carl Employee Machine Operator John Manager	Solid Performer		35,152.00	3 - 4 %	4.00%	Compa-Ratio Current 0.888 Compa-Ratio Proposed 0.923
Jim Employee Machine Operator John	Needs Improvement		38,272.00	0 - 0 %	0.00%	Base Pay Range S1 Last Base Pay Increas... \$18.91 Last Base Pay Increas... 06/06/2017

Step 18

Review the merit proposal for the organization.

Merit Target Range	Merit Increase %	Merit Amount	Merit New Pay Amount
3 - 4 %	4.00%	0.7564	19.6664

Step 19

You may enter changes to the Merit, Additional Amount, and/or Lump Sum.

Note: You may also Send Back to the manager of the organization for him/her to make changes.

Continue 21

Activity (1) 20

Type "@" to tag someone. **Post**

John Manager 20 Minutes ago

Propose Employee Merit Award for John Manager by Manager: Step Completed

Step 20
If you make changes or you plan to Send Back, post in the activity stream to document the required changes.

Step 21
Select **Continue**.

Organization	View	Activity	Status	Employees	Errors	
Steve Director			Awaiting Action	3	1	65
John Manager			Submitted	10	2	95.63%

View Employees with Errors
Search Employees
Send Back
Actions

Return to Top Level 23

Step 22
If you would like to Send Back for the manager to make changes, select **Send Back** under Actions.

Step 23
Once you have reviewed all organizations, select **Return to Top Level**.

Organization Summary:
Merit: 2018 USA Merit Cycle **Actions**

Overall Budget and Spend

97.9% Merit USD 14,463.90 of 14,772.12

Organization	Sub Orgs	View	Propose	Activity	Status	Employees	Merit	Actions
Steve Director					Awaiting Action	13	97.91%	Actions

Submit

Step 24
When no further changes are needed and you are ready to submit merit proposals for all organizations rolling up to you, select **Submit**.

Compensation Review Organization Submit

With this action you are submitting your own and all of the organizations in your hierarchy. You will no longer be able to edit any proposals. 25

Comment

Submit **Cancel** 26

Step 25
Add final comments (optional).

Step 26
Select **Submit**.

Compensation Review Organization Node Submit

The task was completed successfully.

Done

Step 27
Select **Done**.

FAQ's

What happens next? Your merit recommendations will route for additional approvals. Approvals will include your manager, management chain, and Compensation.

What if my recommended spend exceeds by budget? You will receive an error if your spend exceeds your budget. You may still submit the Merit task with this error. However, you should coordinate with your manager prior to doing so.

What if my employee does not submit the Merit task? If your employee has not yet submitted his/her Merit inbox task, in the Sub Org view, you will have an Action available to **Complete on Behalf**. Although you can complete on their behalf, you are encouraged to have your direct reports submit their Merit inbox task as they have the greatest knowledge of their teams.

Organization	View	Activity	Status	Employees	Merit	Actions
Steve Director			Awaiting Action	3	80.00%	Actions
John Manager			Sent Back	10	105.98%	<div style="border: 2px solid #00a0e3; padding: 5px;"> Actions ▾ Search Employees Complete on Behalf </div>

Return to Top Level

How will I know there are adjustments to my recommendations during the approval process? Your manager may send back the Merit task for you to adjust your recommendations. Or it is possible that changes will be made to your recommendations during the approval process. You can view what was finally approved by finding the task in your **Inbox Archive** and selecting **More Details**.

Inbox

Actions (1) **Archive**

Sort By: Newest

From Last 30 Days

Merit: 2018 Merit Cycle - USA for John Manager
4 minute(s) ago - Submitted

View Participant Detail Event **Merit: 2018 Merit Cycle - USA for John Manager** (Actions)

4 minute(s) ago - Submitted

For: John Manager

Participant State: Submitted

Overall Process: Merit: 2018 Merit Cycle - USA

Overall Status: In Progress


Details | Process


Continue to see more details.

More Details

Overall Status will be Complete after all approvals.

Where can I find additional information on the error messages? If you receive an error message, you may need to make changes to the Merit task. A detailed explanation of each possible error message is included below.

Symbol	Severity	Message	Explanation	
	Red Diamond	Critical	Additional Adjustment Note Required If There Is An Additional Adjustment	If managers are providing additional adjustments to employees, they have to justify the increase with a comment
			Cannot award Additional Adjustment if Merit Increase is Below Merit Range Maximum	If managers are awarding a merit increase below the minimum recommended, they first need to use the whole range prior to provide additional adjustments
			Cannot Award Lump Sum if an Employee has a Merit Range	Any employee with a merit range is not eligible for lump sum - Only employees with Compa Ratio above the maximum of the salary range are eligible for this section
			Employee is above the maximum of the salary range. Consider awarding a lump sum in lieu of a merit increase	All employees at or above the maximum of the salary range are not eligible for merit, nor pay adjustment. They can receive a Lump sum in lieu of merit
			If the Merit Range is 0%, Merit Increase % cannot be given - Please utilize Additional Adjustments	Employees with no merit increase range can only receive Additional Adjustments.
			Last Base Pay Increase is less than 60 from merit effective date. Cannot give a merit increase	Employees with increases granted in the last 60 days from Merit effective date are not eligible for merit or additional adjustments increases nor Lump sums.
			Lump Sum Note Required If There Is A Lump Sum Allocation	Managers giving Lump sum amounts will have to provide comments

	Yellow triangle	Warning	Employee can reach but not exceed merit target range % maximum. Can Only Award through Additional Adjustment once Merit Range % maximum is reached	We encourage managers to provide merit increases within the range assigned to their employees. Additional increases must be granted via Additional Adjustment and managers must provide a comment
			Proposed merit below guideline minimum.	Employees that are receiving a merit increase below the minimum of the recommended merit range
			Zero Merit Increase - Merit Not Planned	Column called "Confirm Zero Merit increase" will be available for managers with a default value of "NO". If managers are not giving a merit increase, then they will have to select "YES", that way we avoid managers accidentally leaving employees with Zero merit increase.
			Zero Merit Increase Contradictory Values	Column called "Confirm Zero Merit increase". "Yes" means managers are giving Zero merit increase. If they select "YES" but the employee has a merit increase, then this message will be displayed.