CAREER MANAGER, CAREER MANAGER SENIOR LEADER, VP OR PARTNER, HR TALENT CONSULTANT AND EXCEPTION APPROVER

SALARY PLANNING (PROPOSE AND APPROVE MERIT, MSA, MERIT LUMP SUM INCREASES)

Career managers with compensation responsibility (Senior Associate, Chief Engineer/Scientist/Technologist/Technical Specialist level or higher), HR Talent Consultants, and Exception Approvers use this job aid for guidance during the Salary Planning process to propose and approve Merit Increases for employees (i.e., Merit, Market Salary Adjustment/MSA, and/or Merit Lump Sum increases).

Depending on their level of responsibility, a career manager may perform multiple manager roles during salary planning (e.g., propose increases as well as approve increases). Below is the propose and approval flow for the salary planning process.

Click the role you are being asked to perform in the salary planning process to be moved to the appropriate section of this Job Aid

- **Initiating Career Manager (Sr. Associate, Chief Engineer/Scientist/Technologist/Technical Specialist or higher level)**

- **Approver (Career Manager Senior Leader, VP or Partner, HR Talent Consultant and Exception and Senior Staff Approver (ESSA))**
CAREER MANAGER ROLE

INITIATE AND PROPOSE MERIT INCREASE

1. Once the salary planning process has been launched, managers with salary planning responsibility receive an Outlook email notification and Workday Inbox Action (titled Propose Merit)

   ![Propose Merit Action](image)

   **NOTES:** Compensation career managers receive just one Workday Inbox Action titled Propose Merit Action to use for all US based employees. If you are a MENA compensation manager with employees in the International Cohort, you will receive an Outlook email notification and a Workday inbox action titled Propose Merit: Cohort.

2. Click Propose to enter the proposed increases for your individual employees. If you have multiple supervisory organizations, you also have the option to Propose increases for all your employees at the same time by clicking Propose All.

   ![Propose All Action](image)
3. **Review** and **input** information on the **Propose Awards: Merit** page. **Scroll** down and across the entire **Merit grid** to make sure that all required fields are completed. The amount of the increase will be automatically deducted from the **Remaining Merit Pool** and/or the **Remaining Additional Adjustment Pool**. If the Remaining Merit Pool and the Remaining Additional Adjustment Pool stay **green**, you are at or below your budget. If the figures turn **red**, you are above the budget.

**NOTES:**

- **Remaining Merit Pool** refers to the merit budget and is managed at the account level
- **Remaining Additional Adjustment** is the MSA budget. These adjustments were previously managed at the firm level, but are now at the account level. This means that teams need to manage their MSA within this budget.

**NOTE:**

The **Autofill** option above the Merit grid takes the merit target and autofills it for everyone in the supervisory organization. On the right of the Merit grid is the **Smart Panel**. This panel shows information specific to the employee that you have highlighted for review. In this box, the Merit Target Range (Merit Increase Guidelines) will auto-populate. If the compensation ranges reflect as zero, the employee for which you are proposing a merit increase has recently transferred and the manager receiving the action does not yet have full access rights to the employee’s data. Contact your HR Talent Consultant for further guidance.

DATA IS ILLUSTRATIVE

**NOTE:**

The **Autofill** option above the Merit grid takes the merit target and autofills it for everyone in the supervisory organization. On the right of the Merit grid is the **Smart Panel**. This panel shows information specific to the employee that you have highlighted for review. In this box, the Merit Target Range (Merit Increase Guidelines) will auto-populate. If the compensation ranges reflect as zero, the employee for which you are proposing a merit increase has recently transferred and the manager receiving the action does not yet have full access rights to the employee’s data. Contact your HR Talent Consultant for further guidance.
NOTES:

• If you go over the **Merit Target Range**, you need to add a **merit justification**

• You can propose a Merit and MSA increase together **OR** Lump Sum increase and MSA together. You **should not** propose Merit increase and Lump Sum together. All lump sum increases and MSAs require justification. Lump sum increases over 2% and MSAs over 7% are considered exceptions and require stronger justifications.

• In the Merit grid, a **Compa-Ratio** of 1 means you are at the midpoint. The **Total Increase Amount** and the **Total Increase %** capture merit and MSA.

• Bonus rank information, if applicable to your employee, is calibrated and is not editable.

4. Once you have entered all necessary fields on the proposal page, click **Continue** to move to the Summary Merit page.

5. Review the information on the **Organization Summary Merit** page. Click **Propose** if you need to go back and make edits. Click **Submit** if the information is correct and you will move to the page that shows a summary of the proposed increases and lump sums by supervisory organization.
6. Review the information on the **Finalize Compensation Review Merit** page. Add any comments necessary. Once you have reviewed the information to confirm that it is correct and added comments if needed, click **Submit**. If you are not ready to submit, click **Save for Later**.

**NOTES:**

- This summary page will show a summary of the proposed increases by employee and then takes you to the Details and Process page.

- If you select **Save for Later**, the Merit Action remains in your Workday Inbox as an **Action** until you **Submit** your merit plan. Once submitted, if you’d like to review your submission, you may access it by clicking the **Archive** tab of your Inbox.

- If you used **Propose All** to recommend increases for your employees, you will see a **Submit All** button vs. **Submit**. On the next screen, you will be asked to **Finalize Compensation Review for Multiple Organization** by clicking **OK** or **Cancel**. If you click **Cancel**, the **Action** remains in your Inbox.
7. Review the **Details and Process** page. The **Details** tab shows an overview of the Merit Increase proposal, including **Assigned To**, which shows the next person in the process. The **Process** tab shows the overall process flow. Once you have confirmed that this information is correct, click **Done**. The process workflow will then move to your **Inbox Archive**.

**NOTE:** The Archive updates automatically to reflect the current workflow status during the entire process.

**Up Next:** The Approve Merit Process begins

**NOTE:** If a Senior Associate, Chief Engineer/Scientist/Technologist/Technical Specialist initiates the merit process, the next manager will review and approve. If a level above Sr. Associate, Chief Engineer/Scientist/Technologist/Technical Specialist initiates the merit process, the process moves to the appropriate senior manager for review and approval based on your supervisory organization hierarchy.
APPROVER ROLE

APPROVE MERIT PROCESS

Approvers (Career Manager Senior Leaders, VPs and Partners, HR Talent Consultant and Exception and Senior Staff Approver (ESSA)) within the salary planning process receive an **Outlook email notification and Workday Inbox Action** (titled **Approve Merit: Merit Action**)

You have two options to review and approve the approved salary actions:

1. **Compensation Review – Analytics and Approval View** lets you approve the salary plan at the supervisory level without reviewing individual employee increases

2. **Review Employee Awards View** lets you approve the salary plan once you have reviewed the individual employee increases for a supervisory organization

**NOTES:** You receive **one** Inbox Action for approve merit even if you are approving merit for multiple supervisory organizations. If you are a MENA compensation approver with employees in the International Cohort, you receive an Outlook email notification and a Workday inbox action titled **Propose Merit: Cohort**.

When you click on the Action, a window appears reflecting **embedded analytics** that are linked to the **bar graph** icon at the top right of the screen that show the following by supervisory organization:

- **Remaining Merit Pool** refers to the merit budget and is managed at the account level

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• **Remaining Additional Adjustment** is the MSA budget. These adjustments were previously managed at the firm level, but are now at the account level. This means that teams need to manage their MSA within this budget.

**OPTION 1: COMPENSATION REVIEW – ANALYTICS & APPROVAL**

1. Scroll down in the Inbox Action to the **% of Pool Summary** table to find the supervisory organizations awaiting approval.

![Data Illustrative Table]

**NOTE:** Under the **Ready for Approval** column, if the supervisory organization says **Yes**, it is ready for your review and approval. If it says **Partially**, the full supervisory organization is not ready for approval – some have been submitted and ready for approval, but not all. You may approve the supervisory organizations within the full supervisory organization that are ready for approval. If it says **No**, no one in the supervisory organization has been submitted or approved.

**NOTE:** A **Red Diamond** icon in the supervisory organization row means that the proposed actions place that team over budget.
2. You may approve all supervisory organizations noted with a Yes in the Ready for Approval column without reviewing the grid detail that shows the individual employee increases.

3. Click Approve, and all supervisory organizations noted by Yes in ready for Approval will move to the Finalize Compensation Review for Multiple Organizations page where you can add a comment, if applicable.

**NOTE:** Subordinate supervisory organizations that are ready for approval within the full Supervisory Organization noted as Partially will also move to the Approval stage when you click Approve.

4. Once ready to submit, click OK and then click Done.

See next page for Option 2 Review Employee Awards View that lets you approve the salary plan once you have reviewed the individual employee increases for a supervisory organization.
OPTION 2: REVIEW EMPLOYEE AWARDS VIEW

1. **Scroll** down in the Inbox Action to the **% of Pool Summary** table to find the supervisory organizations awaiting approval.

   ![Data is illustrative](image)

   **TABLE**
<table>
<thead>
<tr>
<th>Organization</th>
<th>Employees</th>
<th>Ready for Approval?</th>
<th>Merit</th>
<th>Additional Adjustment</th>
<th>Lump Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisory Organization</td>
<td>1</td>
<td>Yes</td>
<td>104.00%</td>
<td>0.00%</td>
<td>0.00%</td>
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<td>1.37%</td>
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<tr>
<td>Supervisory Organization</td>
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<td>0.00%</td>
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<tr>
<td>Supervisory Organization</td>
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</tr>
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<td>0.00%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

   ![Approve button](image)

2. **Scroll** down in the Inbox Action to the **% of Pool Summary** table to find the supervisory organizations awaiting approval.

   **NOTE:** Under the **Ready for Approval** column, if the supervisory organization says **Yes**, it is ready for your review and approval. If it says **Partially**, the full supervisory organization is not ready for approval – some have been submitted and ready for approval, but not all. You may approve the supervisory organizations within the full supervisory organization that are ready for approval. If it says **No**, no one in the supervisory organization has been submitted or approved.

3. **Click on the Square or Arrow** icon next to the supervisory organization you would like to review.

   ![Data is illustrative](image)

   **TIP**
   - **Supervisory Organization (Luke Charles | Black Panther (100018))**
   - **Supervisory Organization (Other Employee )**

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NOTE: The Square icon takes you directly to a page where you can view the proposed actions at the employee level. The Arrow icon in the first column indicates that there is more than one supervisory organization under that person. The Arrow icon will take you to a page where you can view all supervisory organizations. From this page, clicking on the Square icon next to any of those supervisory organizations will show you the proposed actions at the employee level.

Review the individual employees’ information, add comments, and edit details as necessary. Scroll down and across the entire Merit grid to be sure all required fields are completed for all employees. Click Approve or Send Back. Click Done after you Approve.

NOTE: If you choose to Send Back the proposed merit action for an employee, you must add a reason otherwise you receive an error/alert message. You can send back the action to any of the managers that have been in the approval process to this point (i.e., proposing career manager or senior career managers who have reviewed). The action for the entire supervisory organization will be sent back, so the approver must include which employee the manager needs to update in the reason text box. The manager receiving the Send Back Action will receive an Action titled Propose Merit or Approve Merit, depending on who receives the send back action.

Once the merit process gets fully approved, the proposing manager has access to view it in the employee record. Upon approval, the merit increase approval process routes to Compensation Administrator for additional review.