

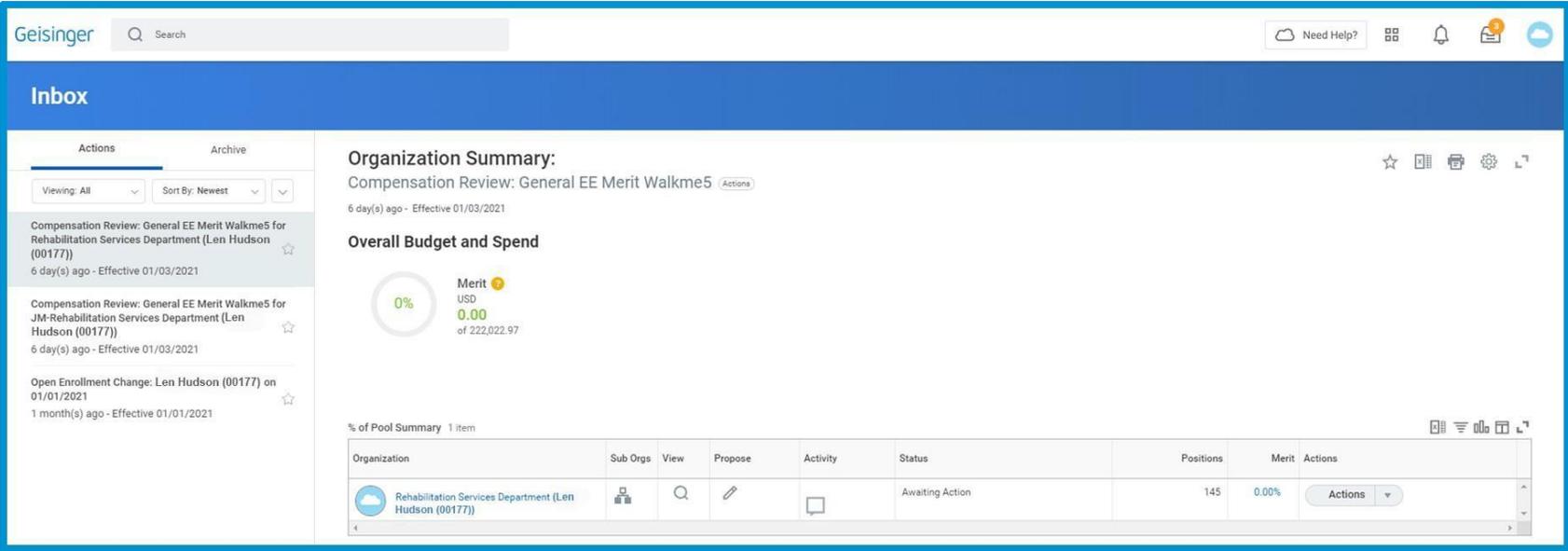
Managers: Annual Merit Awarding – Job Aid

ASSIGNING MERIT INCREASES

Your Workday inbox will have a task(s) labeled Compensation Review: Employee Merit

From your inbox:

1. Open the **Comp Review** task. If you have multiple supervisory orgs (both position **and** job managed organizations (JM)), there will be two separate tasks in your inbox that require assigning merit. Click on the pencil  to propose merit awarding. You can click  to view or award increases in subordinate organizations below you.



The screenshot shows the Geisinger Workday interface. At the top, there is a search bar and navigation icons. The main content area is titled "Inbox" and displays a list of tasks on the left and a detailed view of a selected task on the right. The selected task is "Compensation Review: General EE Merit Walkme5 for Rehabilitation Services Department (Len Hudson (00177))". The task details include an "Organization Summary" section with a "0%" progress indicator and a "Merit" amount of "USD 0.00 of 222,022.97". Below this is a "% of Pool Summary" table with one row for "Rehabilitation Services Department (Len Hudson (00177))" showing "145" positions and "0.00%" merit. The table has columns for Organization, Sub Orgs, View, Propose, Activity, Status, Positions, Merit, and Actions.

Organization	Sub Orgs	View	Propose	Activity	Status	Positions	Merit	Actions
Rehabilitation Services Department (Len Hudson (00177))					Awaiting Action	145	0.00%	Actions

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- 2. To complete the Annual Merit task on behalf of a subordinate organization click **Actions** in the relevant row and select **Complete on Behalf**.

The screenshot shows the Geisinger HR system interface. At the top, there is a search bar and navigation icons. Below that, the 'Organization Summary' section is visible, with a sub-header 'Compensation Review: General EE Merit Walkme5' and an 'Actions' button. The main content area is titled 'Overall Budget and Spend' and features a circular progress indicator showing 0% completion for Merit USD, with a value of 0.00 out of 222,022.97. Below this is a '% of Pool Summary' section with 11 items, which is a table listing subordinate organizations. Each row in the table includes columns for Organization, Sub Orgs, View, Activity, Status, Positions, Merit, and Actions. The 'Actions' column contains a button labeled 'Actions' with a dropdown arrow.

Organization	Sub Orgs	View	Activity	Status	Positions	Merit	Actions
Rehabilitation Services Department (Len Hudson (00177))				Awaiting Action	2	0.00%	Actions
Central Region Rehabilitation Division (Jake Smith (00305))				Awaiting Action	12	0.00%	Actions
GCMC Rehabilitation Division (Jane Dough (00319))				Awaiting Action	27	0.00%	Actions
JM-Central Region Rehabilitation Division (Jake Smith (00305))				Awaiting Action	12	0.00%	Actions
JM-GCMC Rehabilitation Division (Jane Dough (00319))				Awaiting Action	7	0.00%	Actions
JM-Northeast Region Rehabilitation Division (Mimi Flay (00205))				Awaiting Action	6	0.00%	Actions

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- When you click on the pencil, you will see information on your employees for your review. There is a “smart panel” on the right that shows the employee’s Performance Rating, current Disciplinary Actions if any and Compensation Grade Range.
- Award a pay rate increase for each employee based on performance by entering a percentage (i.e. 2.0%) in the Proposed Merit Increase % column. The Actual Merit Increase % and the Merit Increase Amount field will automatically populate.
- If you do not wish to award an employee a merit increase, the “Merit Zero Increase” must be selected to “Yes”. You may also provide any comments justifying zero increase. Employees on a PIP or scored as Underperforming in Position must receive a 0% increase.

Employee	Errors	Critical Validation	Current Base Pay	Current FTE	Merit Budgeted %	Merit Budgeted Amount	Proposed Merit Increase %	Actual Merit Increase %	Merit Increase Amount	New Base Pay	Lump Sum Amount	Merit Zero Increase	Merit Notes
Josie Marcus (00319) Unit Desk Clerk			\$18.94	100%	3.00%	\$0.57	0.00%	0.00%	0.00	\$18.94	0.00	Yes	
Mattie Blaylock (00320) Occupational Therapist			\$45.23	100%	3.00%	\$1.36	3.00%	3.01%	1.36	\$46.59	0.00	No	
Morgan Earp (00551) Occupational Therapist			\$39.39	100%	3.00%	\$1.18	2.50%	2.49%	0.98	\$40.37	0.00	No	
John Holliday (00557) Physical Therapy Assistant			\$24.89	100%	3.00%	\$0.75	3.00%	3.01%	0.75	\$25.64	0.00	No	
John Ringo (00372) Speech Language Pathologist			\$36.80	100%	3.00%	\$1.10	3.00%	2.99%	1.10	\$37.90	0.00	No	
Sam Clemens (00321) Occupational Therapist			\$23.36	100%	3.00%	\$0.70	3.00%	3.00%	0.70	\$24.06	0.00	No	
Bob Foster (00322) Certified Occupational Therapy Assistant			\$28.03	100%	3.00%	\$0.84	3.50%	3.50%	0.98	\$29.01	0.00	No	
Lorem Ipsum (00323) Rehabilitation Assistant			\$39.98	100%	3.00%	\$1.20	4.00%	4.00%	1.60	\$41.58	0.00	No	

Employee
Josie Marcus (00319)

Performance Rating
Exceptional Performance

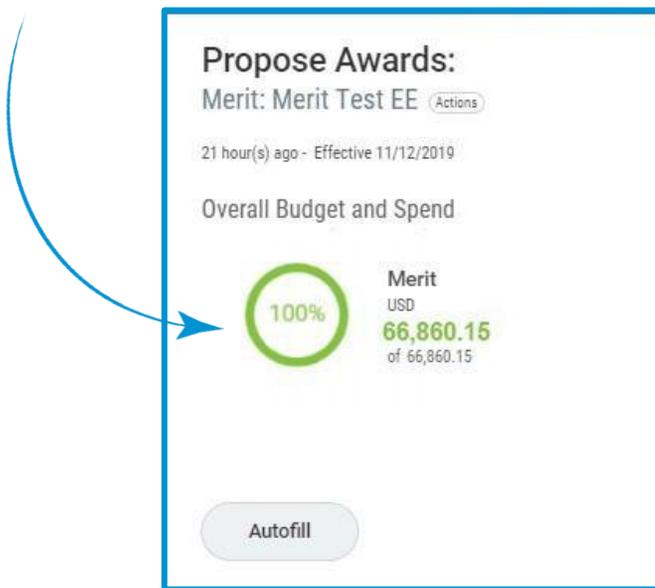
Compensation Grade Range
15.00 - 18.75 - 22.50 USD Hourly

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6. If you receive any validation errors (warning  and/or critical error ) on an employee, you will need to follow the comments/prompts and correct your entry. Warnings alert your attention to an item but won't prevent submission. Critical errors will prevent submission of your awards and need to be rectified first.
7. The budget amount for merit is calculated by Workday when Human Resources launches the merit awarding review – it's a targeted amount based on employees' salaries within their supervisory organization. The overall budget and spend indicator will dynamically update as you enter merit increases. Lump sums will also decrease your overall budget and spend.

Any “unused” monies will roll up to the next level manager.

If assigning merit in a JM sup org the overall budget will show/stay \$0 due to the 0% FTE(s).



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ASSIGNING LUMP SUM AMOUNT

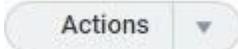
If a merit increase % calculates over the max of the range, a lump sum amount will automatically populate. The New Base Pay will automatically calculate to the max of the range.

If an employee is at or over the max of the range, the merit increase % will auto populate in the lump sum column for those with an FTE. Employees who are a 0% FTE will require a manually calculated lump sum by the manager.

Important Note: The Lump sum amount is an editable field, however, please allow Workday to calculate the correct lump sum amount by using the proposed merit increase % for those with an FTE. Only those employees that calculate over max of grade are eligible for a lump sum amount.

Employee	Errors	Current Base Pay	Current FTE	Merit Budgeted %	Merit Budgeted Amount	Proposed Merit Increase %	Actual Merit Increase %	Merit Increase Amount	New Base Pay	Lump Sum Amount	Merit Zero Increase	Merit Notes
John Dough (00547) Medical Assistant		\$15.45	100%	3.00%	\$0.46	2.75%	2.72%	0.42	\$15.87	100.00	No	
Jane Doe (00012) Medical Assistant		\$15.23	100%	3.00%	\$0.46	3.25%	3.22%	0.49	\$15.72	100.00	No	
Max Zoom (00978) Clinic Nurse		\$27.45	100%	3.00%	\$0.82	3.00%	0.73%	0.20	\$27.65	1,296.88	No	

SUBMITTING MERIT INCREASES

- 8. Merit submissions will automatically “rollup” through the supervisory organization. The top-level manager cannot submit their increases until their entire supervisory organization has completed their awarding.
- 9. If the top-level manager wants to make changes to a subordinate organization, they can send back using the drop down under actions. . Top level managers can also review and make adjustments if needed.