2018 STAFF ANNUAL MERIT FAQs: FOR SALARY PLANNERS, HR PARTNERS, AND STRATEGIC BUSINESS PARTNERS

When working with your Merit workbooks you should be aware of the following:

- **All promotions effective Sep 1 will take place during the merit process through the use of Workday.**
- Your Staff Salary Pre-Planning tool workbook – is a snapshot of the current state of your supervisory organization.
  - Check that the employee belongs in that supervisory organization, and if a change needs to be made, initiate a Change Job business process.
  - Employees within your organization who received a promotion or compensation change with a “Successfully Completed BP” date after July 1 will show up in the “Merit Process – Employee Details – Yale”, but they should not be included in your Merit calculations because they have already received their merit increase. These employees’ salaries will not contribute to your organization’s merit pool.
- The Staff Salary Pre-Planning tool workbook is intended for one time use only; once you have entered your merit ratings and amounts into Workday, the results included in the Merit Process – Employee Details – Yale report will no longer align to the fields included in the Merit Workbook.

**Merit FAQs:**

1. **Q:** How do I complete performance ratings on employees who were removed from the merit process or those individuals who are too new to rate (i.e.; new hires)?
   **A:** HR Partners will be given a list of employees who have been removed from the Merit process (prior to Merit launch) including those that have been removed throughout the Merit process due to promotions or other job changes. The HR Partner will have until August 31 to email their list to the Employee Service Center (employee.services@yale.edu) with the subject line “Merit- Performance Ratings” to have the performance ratings entered into Workday.

2. **Q:** Who can see comments entered during merit?
   **A:** Only individuals involved in the merit process can see comments entered in Workday.

3. **Q:** How do I remove the salary from the merit pool of new employees who are “too new to rate”?
   **A:** Individuals hired within 90 days of September 1 are designated “too new to rate.” If you have a question about their merit pool contribution, send an inquiry to the Employee Service Center. Please submit the Sup Org, Worker Name and Employee ID with your request.

4. **Q:** If processing both a base adjustment and a merit increase, which one should I complete first?
   **A:** Complete the merit increase, and then complete the base adjustment.

5. **Q:** How do I process merit for a part-time employee?
   **A:** Enter in the merit percent into Workday and it will automatically prorate the merit amount based on the employee’s specific FTE percent.

6. **Q:** If someone is resigning from Yale in September, are they still eligible for merit?
   **A:** If you are aware that an employee is resigning from Yale prior to September 30, they should not be included in merit.
7. **Q:** What reports should I use to review Merit?
   **A:** Use the “Merit Process – Employee Details – Yale” report and the Merit dashboard reports.

8. **Q:** How do I see the total percentage spent, not the dollar amount?
   **A:** HR Partners can use the “Staff – Merit Spend To-Date - Yale:” report that is available in the Merit dashboard.

9. **Q:** Are part-time <20 hours, non-benefit eligible and interns eligible for merit?
   **A:** Merit/salary adjustments are compensation and not benefits. However, if they are temporary/casual workers, on-call or some other variation of non-traditional employment, they should be removed from the merit process.

10. **Q:** Why do the merit guidelines default to 3.5% or 4.5% for staff who are in a band, tri-band or ungraded position?
    **A:** The merit guidelines are based on position in range (PIR) and since staff in one of these compensation structures do not have salary ranges and 0% PIR, the guidelines will automatically assume the 1st Quartile. See the Guidelines tab for a chart of guidelines.

11. **Q:** When and how will the salary confirmation statements be available to managers and employees?
    **A:** The salary confirmation statements will be available online in Workday on September 17. A follow-up communication, including instructions on how to view this information in Workday, will be sent to managers as soon as the statements are available for viewing. Managers may notify their staff sooner, provided the new salary, has been approved by their Division head.

12. **Q:** If someone is ineligible for merit, will their name appear on the report?
    **A:** Yes. The employee’s name will appear on the report, but their salary will be zeroed out and the dollars will be excluded from the merit pool.

13. **Q:** How do I delegate the merit task when I am out of the office?
    **A:** You can follow the instructions provided in the Staff Salary Pre-Planning and Merit Process training guide.

14. **Q:** How can I format the Staff Salary Pre-Planning tool to only include employees in a specific Supervisory Organization for purposes of obtaining performance ratings and merit recommendations?
    **A:** You will need to remove the employees from the Workday Download Tab in the Pre-planning tool. You will then need to clear the contents not delete for the rows you wish to remove, then sort the Workday Download by employee ID. Deleting rows in the Workday Download tab will create formula errors in the Worksheet tab.

When you have Questions about Workday Merit, please email Employee.Services@yale.edu and include “Workday Merit” as the subject line.