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Merit lump sum raises are submitted through the Employee Personnel Action Form (EPAF). Submit lump sum EPAFs prior to entering raise amounts into Salary Planner. This will ensure that the lump sum amounts are visible in both Salary Planner and the WebFOCUS Raise Process Worksheet.

Annual Merit Increases -inputting raise amountsPage 9-10

Input proposed raise amounts either by dollar amount or percentage. In order to see the proposed raise amount in the WebFOCUS Raise Process Worksheet, they must be entered into Salary Planner first.

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Locking down the system is completed by the directors, deans, chairs, vice presidents, and the president. This action signifies that all raises have been entered and the final review has taken place.

Using the WebFOCUS Raise Process Worksheet.....Page 12-13

This helpful worksheet will assist you when preparing for the raise process and reviewing raises for general fund, non-general fund, and merit lump sum amounts.

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Here are helpful tips when using Salary Planner and the Raise Process Worksheet.

Contact Human Resources with any questions

906-487-2280

Merit Lump Sum, MERIT

This option is used in conjunction with Salary Planner. This EPAF will provide the selected employee with a one-time lump sum merit increase. When this EPAF is created, the lump sum amount will become visible within Salary Planner.

- Step 1. Enter the employee's **M Number** in the "ID" field and press "Tab"; their name will automatically appear in the next field if you have entered the correct M Number.
- Step 2. Enter the **Query Date** provided within the Salary Planner communication. Be sure to follow the date format of MM/DD/YYYY.
- Step 3. Select the **MERIT** "Approval Category" from the drop down menu.
- Step 4. Click the "Go" button.

New EPAF Person Selection



Home > New EPAF Person Selection

Instructions:

- Enter the employee M number.
- Enter the Query Date (the date that the employee action starts).
- Select the type of EPAF (Approval Category) you wish to process.
- Click "Go".

Note: It is helpful to have looked up the employee in SZASTEM and have a current Employee List report before you begin.

* - indicates a required field.

ID: *	<input type="text" value="M27667925"/>	<input type="text" value="John F Smith"/>	 
Query Date: MM/DD/YYYY*	<input type="text" value="12/29/2019"/>		
Approval Category: *	<input type="text" value="Merit Lump Sum, MERIT"/>		
<input type="button" value="Go"/>	<input type="text" value="Not Selected"/>		
<p>----- FACULTY and STAFF EPAFS -----, NONSTD</p> <p>Merit Lump Sum, MERIT</p>			

- Step 5. Enter the employee's **Position Number** in the "Position" field next to the "New Job" field. The employee's **Position Number** can be found on the departmental roster report or it can be found within Salary Planner. The **Position Number** will begin with "99xxxx" or "V9xxxx".
- Step 6. Enter the two-digit suffix in the "Suffix" field next to the "Position" field, using the last two digits of the current fiscal year (FY2020=20).
- Step 7. Click the "Go" button.

ID: John F Smith, M27667925
 Query Date: December 29, 2019
 Approval Category: Merit Lump Sum, MERIT

Merit Lump Sum Information, MERIT

Search	Type	Position	Suffix	Title	Time Sheet Organization	Start Date	End Date	Last Paid Date	Status	Select
<input type="text"/>	New Job	999495	20							<input type="button" value="⊕"/>
	Primary	999495	00	Business Analyst	26500, Human Resources	Aug 16, 2018		Aug 29, 2019	Active	<input type="button" value="⊖"/>

- Step 8. Fill in the Merit Lump Sum Information section. The "Salary" field and the "Timesheet Org." field will be the only two fields to complete in this section. These two fields will be marked with a red asterisk. All other information will be auto filled.
- The "Salary" field will be the total Merit Lump Sum amount desired for the employee. Enter the employee's regular time sheet organization number in the "Timesheet Org." field. This number can be found on the departmental roster report.

* - indicates a required field.

MERIT - Merit Lump Sum Information, 999495-20 Business Analyst

Item	Current Value	New Value
Salary: *		<input type="text"/>
Timesheet Orgn: *		<input type="text"/>
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="12/29/2019"/>
Job Begin Date: MM/DD/YYYY(Not Enterable)		<input type="text" value="12/29/2019"/>
Contract Type: (Not Enterable)		<input type="text" value="S"/>
Job Status: (Not Enterable)		<input type="text" value="A"/>
Title: (Not Enterable)		<input type="text" value="Merit Lump Sum"/>
FTE: (Not Enterable)		<input type="text" value="0"/>
Employee Class Code: (Not Enterable)		<input type="text" value="ML"/>
Job Change Reason: (Not Enterable)		<input type="text" value="MERTL"/>



Step 9. Update the Index & Labor Distribution section. If the Index is correct, update the Account code in the "Account" field to the appropriate code for the Merit Lump Sum (See Chart 1). Click the "Save" button and move to Step 10.

Employee Group	Regular Position's Account Code	Merit Lump Sum Account Code
Faculty	Starts with "P0xxx"	P017
Exempt Staff	Starts with "P1xxx"	P147
Non-Exempt Staff	Starts with "P3xxx"	P347

Chart 1: Merit Lump Sum Account Codes

LABOR - Index & Labor Distribution, 999495-20 Business Analyst

Current
Effective Date: 12/29/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
U	A11805	G00000	26501		280					100.00			
										Total:	100.00		

Default from Index Save

If the Index is incorrect, change the Percent in the "Percent" field to zero. On the next available labor distribution line, type a U in the "COA" field. Next, type in the desired Index to charge in the "Index" field. Fill in the "Percent" field with the appropriate Percent. Repeat if needed until there is a total of 100% (note: the total percent does not change as you input; this will update when the "Default from Index" button is selected). Click the "Default from Index" button.

LABOR - Index & Labor Distribution, 999495-20 Business Analyst

Current
Effective Date: 12/29/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance	Override	End Date
U	A11805	G00000	26501	P147	280					0			
J	A11823									50			
J	A11850									50			
										Total:	100.00	← note	

Default from Index Save



Clicking on the "Default from Index" button will always cause an error. You are now at the top of the webpage again. Scroll back down to the Index & Labor Distribution section.

Error(s) occurred.

New EPAF | EPAF Originator Summary

Instructions:

- Complete the fields necessary to process this EPAF.
- Click "Save" at any time to save your work.
- Once you have completed the EPAF and saved your work, click "Submit".

For more information on how to process EPAFs, please use the [Originator's Handbook](#).

Note: You must save the EPAF before you will be able to submit it for approval.

Name and ID: John F Smith, M27667925

Transaction: **Query Date: December 29, 2019**

Transaction Status:

Approval Category: Merit Lump Sum, MERIT

Save

Approval Types ■ Account Distribution ■ Errors ■ Routing Queue ■ Comments ■ Transaction History

Jump to Bottom

Errors and Warning Messages

Type	Message Type	Description
Index & Labor Distribution	ERROR	Account code is required.
Index & Labor Distribution	ERROR	Account code is required.
Index & Labor Distribution	ERROR	Account code is required.

Merit Step 9 (Index is Incorrect)

You will notice that all of the **Account** codes are missing. Enter in the appropriate **Account** code in **ALL** of the "Account" code fields that have an Index (See [Chart 1](#)). Click the "Save" button.

LABOR - Index & Labor Distribution, 999495-20 Business Analyst

Current
Effective Date: 12/29/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date
Q	U	Q	A11805	G00000	26501	Q						
Q	U	Q	A11823	G00000	40010	Q						
Q	U	Q	A11850	G00000	41101	Q						
Q	Q					Q						
Q	Q					Q						
										Total:	100.00	

Default from Index

Step 10. In the Index & Labor Distribution section, place a check mark in all of the "Remove" boxes associated with Index lines with zero percent.

LABOR - Index & Labor Distribution, 999495-20 Business Analyst

Current
Effective Date: 12/29/2019

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override	End Date	Remove
Q	U	Q	A11805	G00000						.00			<input checked="" type="checkbox"/>
Q	U	Q	A11823	G00000						50.00			<input type="checkbox"/>
Q	U	Q	A11850	G00000						50.00			<input type="checkbox"/>

Step 11. In the Routing Queue section, insert the proper **User Name** in the "User Name" field next to the "Approval Level" field. If you are unsure of which **User Name** to enter, you can search for the **User Name** by selecting the search magnifying glass next to the "User Name" field.

Routing Queue

Approval Level	User Name	Required Action
250 - (MERIT) MERIT Lump Sum Approval	Q	Approve
299 - (FINMGR) Financial Managers	Q	Pay
400 - (EMPLOY) HR Employment Services	Q	Apply
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected
Not Selected	Q	Not Selected

The Routing Queue section will default three “Approval Levels” that are the minimum requirement for this type of EPAF. One of these “Approval Levels” is for the Financial Manager(s) of the Index(es) in the “Index & Labor Distribution” section. If there is more than one Financial Manager involved, go to the next available line within the “Routing Queue” section (marked as **Not Selected**, and use the drop down function to add in an additional **Financial Managers** “Approval Level”.

Routing Queue

Approval Level	User Name
259 - (MERIT) MERIT Lump Sum Approval	DDRE
299 - (FINMGR) Financial Managers	RLHIL
400 - (EMPLOY) HR Employment Services	MWGA
Not Selected	
Not Selected	
2 - (PROXY) Proxy Level	
20 - (DCOORD) Dept EPAF Approver	
21 - (LOSPV) Level 1 Supervisors	
22 - (LTSPV) Level 2 Supervisors	
150 - (GRADSC) Graduate School	
160 - (SPACTG) Spon Prog Acct Grad Student	
160 - (SPACUG) Spon Prog Acct UnderGrad	
200 - (HRREV) HR Employment Review	
203 - (BREV) Benefits Review	
204 - (PREV) Payroll Review	
220 - (SRADMN) Sr Admin (Deans/Chairs/Dir)	
230 - (AAO) Affirmative Action	
240 - (SPA) Sponsored Programs Accounting	
259 - (MERIT) MERIT Lump Sum Approval	
260 - (EXEC) Executive Team	
295 - (PAYSTF) Payroll Staff	
299 - (FINMGR) Financial Managers	
300 - (ACADHR) Academic HR	
300 - (HRAPPL) HR Apply	

Merit Step 11 (add additional Financial Manager)

Next, add in the proper **User Name**. Finally, move to the “Required Actions” field and use the drop down function to change from **Not Selected** to **FYI**. Repeat until all Financial Managers involved are added to the “Routing Queue”.

	Required Action
d	Approve
iller	FYI
ne Gaddis	Apply
la	Not Selected
	Not Selected
	Approve
	FYI
	Apply
	Superuser Submit

Step 12. Click the “Save” button.

Step 13. At this point, all of the necessary information has been completed.

Please review all of the entries made for this EPAF. If any changes need to be made, proceed to update the necessary field(s).

If any fields within the EPAF have been changed, you must “Save” the EPAF again prior to submission.

Once satisfied with the entries, click the “Submit” button to finish the EPAF. This will update the EPAF to a status of Pending. The EPAF is now pending the approval of the person chosen in the MERIT Lump Sum Approval level.

If the EPAF needs to be reviewed after it has been submitted, you can find this EPAF under the “History” tab of the “EPAF Originator Summary” menu.

The annual merit increase process consists of inputting the merit raises using the Banner product *Salary Planner*. Follow the step by step instructions below. Position management data will not be available during the raise process.

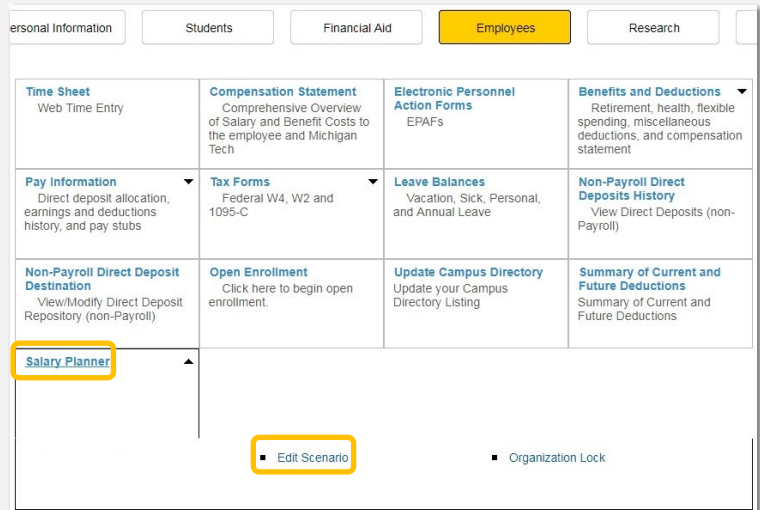
NOTE— *Lump Sum EPAF's must be completed and submitted before they will become visible in Salary Planner.*

STEP 1: Login to Banweb

<https://www.banweb.mtu.edu>

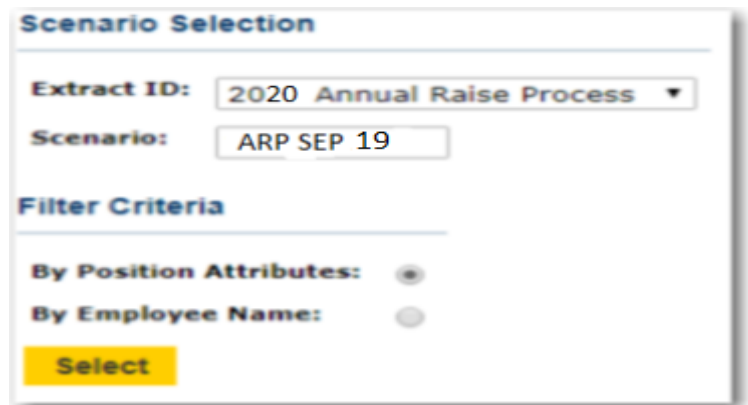
STEP 2: Select:

- Employees
- Salary Planner
- Edit Scenario



STEP 3: Extract ID: **2020 Annual Raise Process**

- Scenario: **ARP SEP 19**
- Filter by: Position Attributes
- Click Select



STEP 4: Select:

- Your Organization # (s)
- Employee Class: All
- Select: List By Employee



Step 5: Review Salary Planner columns

		Department Totals					
ID and Name	Position, Suffix and Title	Base Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Salary	Proposed Lump Sum
M 123456789 Bob Smith	999833 - 00 Director	100.00	50,000.00	.00	.00	50,000.00	
M987654321 Jane Doe	999334 - 00 Assistant Dean	100.00	60,000.00	.00	.00	60,000.00	

Step 6: Input raises by \$ amount or by percentage.

		Department Totals					
ID and Name	Position, Suffix and Title	Base Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Salary	Proposed Lump Sum
M 123456789 Bob Smith	999833 - 00 Director	100.00	50,000.00	3.0	1500.00	56,500.00	600.00
M987654321 Jane Doe	999334 - 00 Assistant Dean	100.00	60,000.00	3.3	2,000.00	62,000.00	

NOTE: Do not use the **ENTER** button. Use the **SAVE** button which is easily accessed by clicking “**Jump to Bottom**” under each org.

Step 7: Use summary totals, located at the bottom of the page, to review totals.

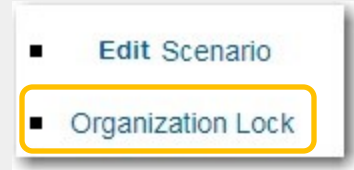
Step 8: Click **SAVE** at the bottom of the page.

For questions, please contact Human Resources 906-487-2280.

During the raise process, each area will set their deadline for inputting raises. Once all raises have been entered, the department will “lock down” their area to indicate they have completed their input. Locking the system at the VP unit level prevents any additional edits from the department levels below.

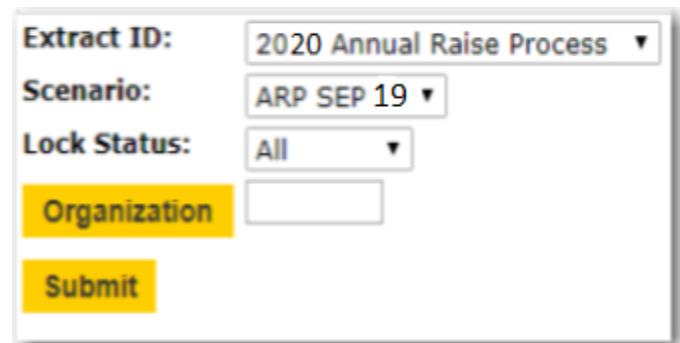
Step 1: Login to Banweb

- Select Salary Planner
- Select Organization Lock



Step 2: Extract : **2020 Annual Raise Process**

- Scenario : **ARP SEP 19**
- Select Lock Status: **All**
- Enter your Org # or leave blank to



Step 3: Locking Orgs

- Check the **CHANGE** box next to org/s
- Click **UPDATE** button

Organization Lock Status

Organization	Title	Lock Status	Change
30010	Human Resources	Unlocked	<input checked="" type="checkbox"/>
30070	Facilities Management	Unlocked	<input type="checkbox"/>
38090	Auxiliary Services	Unlocked	<input type="checkbox"/>
40050	Vice Pres Administration	Unlocked	<input type="checkbox"/>

Review Update

Step 4: Unlocking Orgs

- Check the **CHANGE** box next to org/s
- Click **UPDATE** button

Organization	Title	Lock Status	Change
30010	Human Resources	Locked	<input type="checkbox"/>
30070	Facilities Management	Unlocked	<input type="checkbox"/>
38090	Auxiliary Services	Unlocked	<input type="checkbox"/>
40050	Vice Pres Administration	Unlocked	<input type="checkbox"/>

Review Update

Below are instructions on how to run and use the **WebFOCUS Raise Process Worksheet**. This EXCEL worksheet is designed to assist you when determining raises amounts for general and non-general funded employees.

STEP 1: Login to Banweb

<https://www.banweb.mtu.edu>

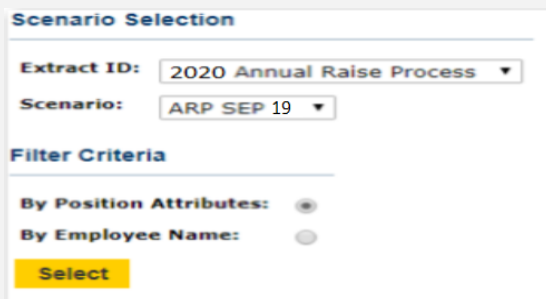
STEP 2: Follow the basic instructions to log into Salary Planner (found on page 9)

STEP 3: Extract ID: 2020 Annual Raise Process

- Scenario: **ARP SEP 19**
- Filter by: Position Attributes

STEP 4: Select:

- Your Organization #
- Employee Class: All



Scenario Selection

Extract ID: 2020 Annual Raise Process

Scenario: ARP SEP 19

Filter Criteria

By Position Attributes:

By Employee Name:

Select



2020 Annual Raise Process, ARP SEP 21

Organizations: All
00001 - Board Of Trustees//President
00500 - Internal Audit

Include Subordinate Organizations:

Employee Class: All
CF - Coach Full Time
CP - Coach Part Time

Number of Records per Page: 100

List By Employee Summary Totals List By Position

STEP 5: Enter your proposed raise amounts into Salary Planner

- Ensure that all Merit Lump Sum EPAF's have been created and submitted prior to starting this step (see page 2-8)
- Save
- Move to top of the first screen to access the **WebFOCUS Raise Process Worksheet**

WebFOCUS Raise Process Worksheet— This helpful worksheet will assist you when preparing for the raise process and reviewing raises for general fund, non-general fund, and merit lump sum amounts.

STEP 1: The **Raise Process Worksheet** is located on the top left of the first screen



STEP 2: The link will take you to the log-in screen for WebFOCUS. Utilizing your ISO userID and password, log into WeFOCUS. The report will generate and automatically download.

NOTE: All data in Salary Planner will show up in your WebFOCUS worksheet.

This worksheet is used as a guide and can NOT be uploaded back into Salary Planner.

Below provides a view of the report. The next page will provide valuable tips for using both Salary Planner and this worksheet.

NOTE: Click **ENABLE EDITING** when Excel worksheet opens.

Enable Editing

STEP 3: The following columns will display current salary information, raise amounts entered, and proposed salary for general fund and non-general fund:

CURRENT SALARIES: Columns D, E, F, G, and H represent the current salary information.

D	E	F	G	H
Current Annual Salary	Position Labor GF Pct	Position Labor Non-GF Pct	Current Annual Salary GF	Current Annual Salary Non-GF
\$50,000.00	100.00%	.00%	\$50,000.00	\$5.00

PROPOSED SALARIES: Columns I, J, K, L, M, N, and O represent the proposed raise amounts entered and proposed salary.*

*The proposed raise amounts are distributed based the most recent position labor distribution in Banner.

I	J	K	L	M	N	O
Total Raise Amount	Raise Pct	Raise Amount GF	Raise Amount Non-GF	Proposed Salary	Proposed Salary GF	Proposed Salary Non-GF
\$1,000.00	.00%	\$5.00	\$5.00	\$51,000.00	\$51,000.00	\$5.00

MERIT LUMP SUMS: Columns P, Q, R, S, T and U represent the Merit Lump Sum EPAFs previously created.*

* In order to view Merit Lump Sums in Salary Planner and the WebFOCUS worksheet, they must be created and submitted prior to starting the raise process. Merit lump sum distribution is based on the information entered in the EPAF.

P	Q	R	S	T	U
Merit Lump Sum Amount	Merit Lump Sum GF Pct	Merit Lump Sum Non-GF Pct	Merit Lump Sum GF	Merit Lump Sum Non-GF	Merit Position Labor Non-GF Distribution
\$5.00	.00%	.00%	\$5.00	\$5.00	A00000 - 100.00%

Here are helpful tips for using Salary Planner and the Raise Process Worksheet together.

TIPS

- ⇒ Run the **Raise Process Worksheet** during the raise process to check % amounts, double check totals, and ensure all data is entered.

- ⇒ Run the **Raise Process Worksheet** at the end of the raise process for final review before locking down your department's amounts.

- ⇒ If you have two screens, open Salary Planner in one screen and the **Raise Process Worksheet** in another. Using the worksheet, you can determine the correct amounts to enter into Salary Planner. After saving your Salary Planner data, a new report will need to be run.

NOTE: The **Raise Process Worksheet** will only export data from Salary Planner. The worksheet can not be uploaded back into Salary Planner.

Contact Human Resources with any questions

906-487-2280