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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.

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.

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.

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.

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: ***** M27667925   John F Smith

Query Date: MM/DD/YYYY *****   12/16/2018

Approval Category: *****   Merit Lump Sum, MERIT

Go

Not Selected
---------------- FACULTY and STAFF EPAFS ----------------, NONSTD
Merit Lump Sum, MERIT

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 (FY2019=19).

Step 7.   Click the "Go" button.

ID:		John F Smith, M27667925								
Query Date:		December 16, 2018								
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
🔍	New Job									◉
	Primary	999495	00	Business Analyst	26500, Human Resources	Aug 16, 2018		Aug 29, 2018	Active	○

All Jobs

Next Approval Type   Go

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- 19 Business Analyst

Item	Current Value	New Value
Salary: *		
Timesheet Orgn: *		🔍
Jobs Effective Date: MM/DD/YYYY(Not Enterable)		12/16/2018
Job Begin Date: MM/DD/YYYY(Not Enterable)		12/16/2018
Contract Type: (Not Enterable)		S
Job Status: (Not Enterable)		A
Title: (Not Enterable)		Merit Lump Sum
FTE: (Not Enterable)		0
Employee Class Code: (Not Enterable)		ML
Job Change Reason: (Not Enterable)		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, 999495-19, Business Analyst

Current

Effective Date: 12/16/2018

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New

Effective Date: MM/DD/YYYY 12/16/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent
U	A11805	G00000	26501	P141	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, 999495-19 Business Analyst

Current

Effective Date: 12/16/2018

COA Index Fund Organization Account Program Activity Location Project Cost Percent Encumbrance Override End Date

New

Effective Date: MM/DD/YYYY 12/16/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance
U	A11805	G00000	26501	P147	280					0	
U	A11823									50	
U	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) occured.

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 16, 2018**

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, 999495-19 Business Analyst

Current

Effective Date: 12/16/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encumbrance Override End Date

New

Effective Date: MM/DD/YYYY 12/16/2018

COA	Index	Fund	Organization	Account	Program	Activity	Location	Project	Cost	Percent	Encu
U	A11805	G00000	26501		280					.00	
U	A11823	G00000	40010		265					50.00	
U	A11850	G00000	41101		271					50.00	
									Total:	100.00	

[Default from Index] [Save]

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, 999495-19 Business Analyst

Current

Effective Date: 12/16/2018

COA	Index	Fund	Organization	A...	...d Date

New

Effective Date: MM/DD/YYYY 12/16/2018

COA	Index	Fund	...	Cost	Percent	Encumbrance Override End Date	Remove
U	A11805	G00000			.00		☑
U	A11823	G00000			50.00		☐
U	A11850	G00000			50.00		☐

Cost	Percent	Encumbrance Override End Date	Remove
	.00		☑
	50.00		☐
	50.00		☐

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
259 - (MERIT) MERIT Lump Sum Approval		Approve
299 - (FINMGR) Financial Managers		FYI
400 - (EMPLOY) HR Employment Services		Apply
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected
Not Selected		Not Selected

[Save]

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 Nar
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	
e Hiller	FYI	
ne Gaddis	Apply	
ala	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.
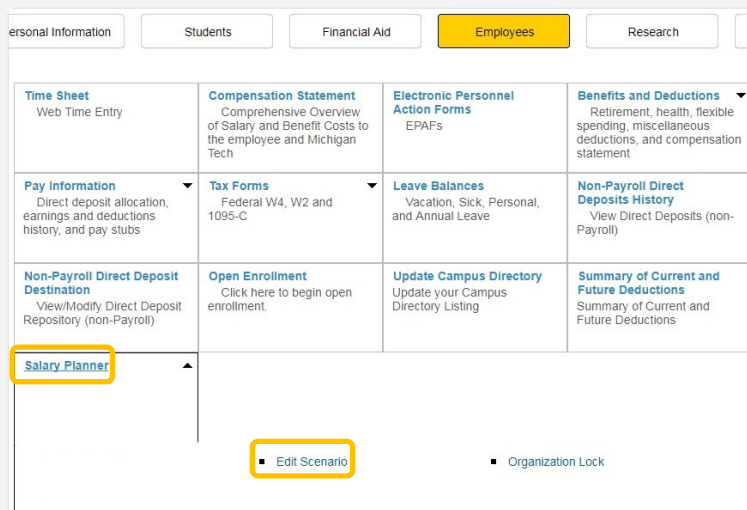
NOTE— *Lump Sum EPAF's must be completed and submitted before they will become visible in Salary Planner.*

STEP 1: Login to Banweb

https://www.banweb.mtu.edu

STEP 2: Select:
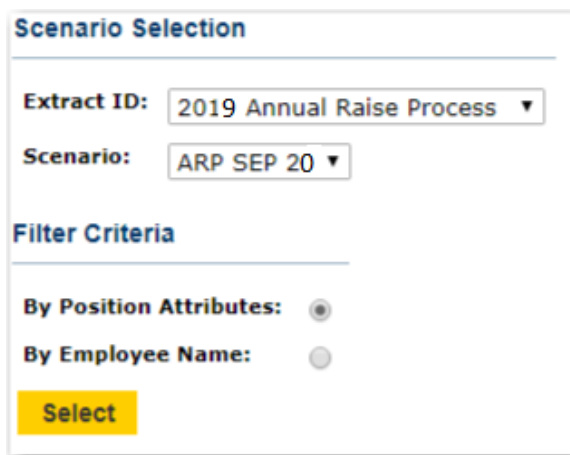
- Employees
- Salary Planner
- Edit Scenario

STEP 3: Extract ID: **2019 Annual Raise Process**

- Scenario: **ARP SEP 20**
- 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.

REVIEW: Ensure that your exempt employees' **Proposed Salaries** are rounded to the next dollar.

- Return to **Step 4** and select CF, CP, EX, FC, FF, FD, FP, FR, NS, PF, PP, RF

- Ensure all salaries are rounded to a dollar amount

- If not, adjust the amounts accordingly

2017 Annual Raise Process, ARP SEP 20
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

ID and Name	Position, Suffix and Title	Base Appointment Percent	Base Salary	Change Percent	Change Amount	Proposed Salary	Proposed Lump Sum
M12345678 John Smith	911111 - Research Assistant	100.00	40,913.60	5.00	2,045.68	42,959.28	

Should be **42,960.00** or **42,959.00**

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

■   Edit Scenario

■   Organization Lock

.

Step 2:   Extract : **2019 Annual Raise Process**

- Scenario : **ARP SEP 20**

- Select Lock Status: **All**

- Enter your Org # or leave blank to

Extract ID:	2019 Annual Raise Process ▼
Scenario:	ARP SEP 20 ▼
Lock Status:	All ▼
Organization	
Submit	

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	☑
30070	Facilities Management	Unlocked	☐
38090	Auxiliary Services	Unlocked	☐
40050	Vice Pres Administration	Unlocked	☐

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	☐
30070	Facilities Management	Unlocked	☐
38090	Auxiliary Services	Unlocked	☐
40050	Vice Pres Administration	Unlocked	☐

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.
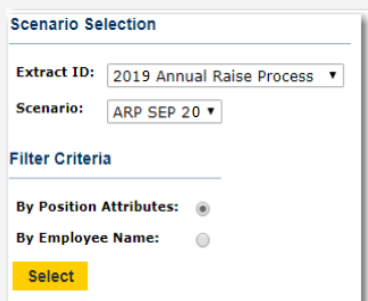
STEP 1: Login to Banweb

https://www.banweb.mtu.edu

STEP 2: Follow the basic instructions to log into Salary Planner (found on page 9)
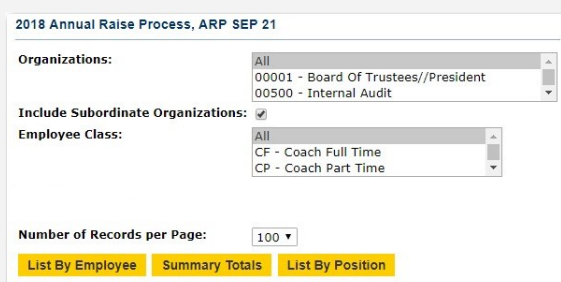
STEP 3: Extract ID: **2019 Annual Raise Process**

- Scenario: **ARP SEP 20**
- Filter by: Position Attributes
- Click Select

STEP 4: Select:

- Your Organization #
- Employee Class: All
- Select: List By Employee

Scenario Selection

Extract ID: 2019 Annual Raise Process ▼
Scenario: ARP SEP 20 ▼

Filter Criteria

By Position Attributes: ●
By Employee Name: ○
Select

2018 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

List By Employee

← | Home > **List By Employee**

➡ Run WebFOCUS report HRREPT003 Raise Process Worksheet.

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	$.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%	$.00	$.00	$51,000.00	$51,000.00	$.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	
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 Distribution
$.00	.00%	.00%	$.00	$.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