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Merit Lump Sum EPAFs..................................................................................................Page 1-8

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 amounts .................................................Page 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.

Annual Merit Increases — locking down the system............................................Page 11

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.

Helpful tips when using the worksheet..............................................................Page 14

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

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 S2ASTEM 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
Not Selected
FACULTY and STAFF EPAFS: NONSTD
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.

---

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.

---

**MERIT - Merit Lump Sum Information, 999495. 19 Business Analyst**

<table>
<thead>
<tr>
<th>Item</th>
<th>Current Value</th>
<th>New Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary:</td>
<td></td>
<td><img src="image" alt="Salary Field" /></td>
</tr>
<tr>
<td>Timesheet Orgn:</td>
<td></td>
<td><img src="image" alt="Timesheet Orgn Field" /></td>
</tr>
<tr>
<td>Jobs Effective Date:</td>
<td>MM/DD/YYYY</td>
<td>12/16/2018</td>
</tr>
<tr>
<td>Job Begin Date:</td>
<td>MM/DD/YYYY</td>
<td>12/16/2018</td>
</tr>
<tr>
<td>Contract Type:</td>
<td>(Not Enterable)</td>
<td></td>
</tr>
<tr>
<td>Job Status:</td>
<td>(Not Enterable)</td>
<td></td>
</tr>
<tr>
<td>Title:</td>
<td>(Not Enterable)</td>
<td></td>
</tr>
<tr>
<td>FTE:</td>
<td>(Not Enterable)</td>
<td></td>
</tr>
<tr>
<td>Employee Class Code:</td>
<td>(Not Enterable)</td>
<td></td>
</tr>
<tr>
<td>Job Change Reason:</td>
<td>(Not Enterable)</td>
<td></td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Employee Group</th>
<th>Account Code</th>
<th>Merit Lump Sum Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>Starts with “P0xxx”</td>
<td>P017</td>
</tr>
<tr>
<td>Exempt Staff</td>
<td>Starts with “P1xxx”</td>
<td>P147</td>
</tr>
<tr>
<td>Non-Exempt Staff</td>
<td>Starts with “P3xxx”</td>
<td>P347</td>
</tr>
</tbody>
</table>

Chart 1: Merit Lump Sum Account Codes

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.
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.**

###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**

<table>
<thead>
<tr>
<th>Approval Types</th>
<th>Account Distribution</th>
<th>Errors</th>
<th>Routing Queue</th>
<th>Comments</th>
<th>Transaction History</th>
</tr>
</thead>
</table>

**Jump to Bottom**

###Errors and Warning Messages

<table>
<thead>
<tr>
<th>Type</th>
<th>Message Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Index &amp; Labor Distribution</td>
<td>ERROR</td>
<td>Account code is required.</td>
</tr>
<tr>
<td>Index &amp; Labor Distribution</td>
<td>ERROR</td>
<td>Account code is required.</td>
</tr>
<tr>
<td>Index &amp; Labor Distribution</td>
<td>ERROR</td>
<td>Account code is required.</td>
</tr>
</tbody>
</table>

*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.

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
<th>Cost</th>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>001500</td>
<td>001</td>
<td>000000</td>
<td>20122</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001500</td>
<td>001</td>
<td>000000</td>
<td>20122</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001500</td>
<td>001</td>
<td>000000</td>
<td>20122</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.

<table>
<thead>
<tr>
<th>COA Index</th>
<th>Fund</th>
<th>Organization</th>
<th>Account</th>
<th>Program</th>
<th>Activity</th>
<th>Location</th>
<th>Project</th>
<th>Cost</th>
<th>Percent</th>
<th>Encumbrance Override End Date</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>001500</td>
<td>001</td>
<td>000000</td>
<td>20122</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001500</td>
<td>001</td>
<td>000000</td>
<td>20122</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001500</td>
<td>001</td>
<td>000000</td>
<td>20122</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.
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”.

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”.

Merit Step 11 (add additional Financial Manager)
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](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

<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>Base Appointment Percent</th>
<th>Base Salary</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Salary</th>
<th>Proposed Lump Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>M 12345678</td>
<td>00 Director</td>
<td>100.00</td>
<td>50,000.00</td>
<td></td>
<td></td>
<td>50,000.00</td>
<td></td>
</tr>
<tr>
<td>Bob Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MS012345678</td>
<td>00 Assistant Dean</td>
<td>100.00</td>
<td>60,000.00</td>
<td></td>
<td></td>
<td>60,000.00</td>
<td></td>
</tr>
<tr>
<td>Jane Doe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>Base Appointment Percent</th>
<th>Base Salary</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Salary</th>
<th>Proposed Lump Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>M 12345678</td>
<td>00 Director</td>
<td>100.00</td>
<td>50,000.00</td>
<td>3.0</td>
<td>1500.00</td>
<td>55,500.00</td>
<td>600.00</td>
</tr>
<tr>
<td>Bob Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MS012345678</td>
<td>00 Assistant Dean</td>
<td>100.00</td>
<td>60,000.00</td>
<td>3.3</td>
<td>2000.00</td>
<td>62,000.00</td>
<td></td>
</tr>
<tr>
<td>Jane Doe</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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, FR, NS, PF, PP, RF
- Ensure all salaries are rounded to a dollar amount
- If not, adjust the amounts accordingly

<table>
<thead>
<tr>
<th>ID and Name</th>
<th>Position, Suffix and Title</th>
<th>Base Appointment Percent</th>
<th>Base Salary</th>
<th>Change Percent</th>
<th>Change Amount</th>
<th>Proposed Salary</th>
<th>Proposed Lump Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>M 12345678</td>
<td>Research Assistant</td>
<td>100.00</td>
<td>40,613.50</td>
<td>5.0</td>
<td>2045.68</td>
<td>42,659.28</td>
<td>280.00</td>
</tr>
<tr>
<td>John Smith</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

**Step 2:** Extract: 2019 Annual Raise Process
- Scenario: ARP SEP 20
- 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

**Step 4:** Unlocking Orgs
- Check the CHANGE box next to org/s
- Click UPDATE button
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

**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.

**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.

<table>
<thead>
<tr>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Annual Salary</td>
<td>Position Labor GF Pct</td>
<td>Position Labor Non-GF Pct</td>
<td>Current Annual Salary GF</td>
<td>Current Annual Salary Non-GF</td>
</tr>
<tr>
<td>$50,000.00</td>
<td>100.00%</td>
<td>.00%</td>
<td>$50,000.00</td>
<td>$50,000.00</td>
</tr>
</tbody>
</table>

**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 on the most recent position labor distribution in Banner.

<table>
<thead>
<tr>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
<th>O</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Raise Amount</td>
<td>Raise Amount Pct</td>
<td>Raise Amount GF</td>
<td>Raise Amount Non-GF</td>
<td>Proposed Salary GF</td>
<td>Proposed Salary Non-GF</td>
<td></td>
</tr>
<tr>
<td>$1,000.00</td>
<td>.00%</td>
<td>$5.00</td>
<td>$5.00</td>
<td>$51,000.00</td>
<td>$51,000.00</td>
<td>$5.00</td>
</tr>
</tbody>
</table>

**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.
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