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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

[Image: Screen capture of the EPAF Person Selection page with the following details:
- ID: M27667925
- Query Date: 12/29/2019
- Approval Category: Merit Lump Sum, MERIT
- Search icon and dropdown menu options.
]
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.

---

**Merit Lump Sum Information, 999495-20 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></td>
</tr>
<tr>
<td>Timesheet Org: *</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jobs Effective Date: MM/DD/YYYY</td>
<td></td>
<td>12/29/2019</td>
</tr>
<tr>
<td>Job Begin Date: MM/DD/YYYY</td>
<td></td>
<td>12/29/2019</td>
</tr>
<tr>
<td>Contract Type: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Status: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Title: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FTE: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee Class Code: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job Change Reason: (Not Enterable)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.
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>Regular Position's Account Code</th>
<th>Merit Lump Sum Account Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty</td>
<td>Starts with &quot;P0xxx&quot;</td>
<td>P017</td>
</tr>
<tr>
<td>Exempt Staff</td>
<td>Starts with &quot;P1xxx&quot;</td>
<td>P147</td>
</tr>
<tr>
<td>Non-Exempt Staff</td>
<td>Starts with &quot;P3xxx&quot;</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.**

New EPAF | EPAF Originator Summary

- 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

---

**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.

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.

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”.

![Routing Queue Diagram]

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

**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

<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 123456789</td>
<td>Bob Smith</td>
<td>100.00</td>
<td>50,000.00</td>
<td>.00</td>
<td>.00</td>
<td>50,000.00</td>
<td></td>
</tr>
<tr>
<td>M 90987654321</td>
<td>Jane Doe</td>
<td>100.00</td>
<td>60,000.00</td>
<td>.00</td>
<td>.00</td>
<td>60,000.00</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 123456789</td>
<td>Bob Smith</td>
<td>100.00</td>
<td>50,000.00</td>
<td>3.0</td>
<td>1500.00</td>
<td>56,500.00</td>
<td>600.00</td>
</tr>
<tr>
<td>M 90987654321</td>
<td>Jane Doe</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>
</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.

**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

**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: 2020 Annual Raise Process
- Scenario: ARP SEP 19
- Filter by: Position Attributes

**STEP 4:** Select:
- Your Organization #
- Employee Class: All

**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**

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**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.
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>$0.00</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>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>$0.00</td>
<td>$0.00</td>
<td>$51,000.00</td>
<td>$51,000.00</td>
<td>$0.00</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