

MRT: Enter Merit

Each year, managers calculate the merit increase for their employees, based on the employee's previous year's performance. Details and local process for merit pools will be managed by your school/unit leadership. At the beginning of the merit phase, managers or Workday Merit Delegates may receive up to four inbox tasks to calculate merit increases. The number of tasks depends on the type of workers employed in the manager's supervisory organization. The four merit groups include:

- University Staff (non-School of Medicine)
- University Staff (School of Medicine)
- A&P Faculty and Professional Research Staff (non-School of Medicine)
- A&P Faculty and Professional Research Staff (School of Medicine)

Chapters


1. [Who is Eligible/Participating?](#)
2. [Classified Staff](#)
3. [Open Merit](#)
4. [Overview of Merit Table](#)
5. [Overview of Merit Grid](#)
7. [Enter Merit](#)
8. [Complete on Behalf \(mgr entering merit for subordinate mgr\)](#)
9. [Errors and Warnings](#)
10. [Reports: Export Merit Table or View Date of Last Pay Change](#)
11. [Additional Resources](#)

Who is Eligible and Participating

| Managers of the following groups will enter merit in Workday. | Managers of the following groups will calculate merit using processes outside of Workday. |
|--|---|
| <ul style="list-style-type: none">University Staff – exempt and non-exemptClassified Staff – Human Resources will enter increasesAdministrative and Professional FacultyProfessional Research Staff | <ul style="list-style-type: none">Teaching and Research Faculty |
| Eligible | Not Eligible |
| <ul style="list-style-type: none">Hired before 01/01/2023Full-time, Part-timeOn leave with pay | <ul style="list-style-type: none">Wage or Temporary WageOn leave without pay – eligible on return and pay is reactivatedSevered employment as of 7/4/23 |

Open Merit

Managers receive an inbox task to input merit. It is not possible to navigate to Merit elsewhere in Workday. Managers may receive multiple merit tasks depending on they type of direct reports (listed in the introduction of this job aid).



1. Click on the Workday **Inbox**  .
2. Locate the task that begins with **Compensation Review**.
3. There may be more than one **Compensation Review** task if there are a mix of employee types on the team.

Overview of Merit Table

The key below the table describes each numbered item.

Overall Budget and Spend



| Organization | Sub Orgs | View | Propose | Activity | Status | Positions | Errors | Merit | Actions |
|--|---|---|---|---|-----------------|-----------|---|--------|---|
|  Manager Department/ Name |  |  |  |  | Awaiting Action | 7 |  4 | 88.44% | Actions  |
| | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |

1. Percent of budget remaining as merit is entered (direct reports only).
2. Green dollars = merit awarded. Black dollars = total dollars in budget.
3. Click to display direct reports who are managers.
4. Click to display 'view only' of all employees in management chain.
5. Opens the calculation table for direct reports.
6. Ability to tag a message to anyone at UVA.
7. Status of progression in entering merit.
8. Number of positions in both immediate and sub organizations.
9. Click the number to expose errors. Must be addressed to advance.
10. Percent of budget dollars currently calculated. To continue to calculate, click on Propose (item 5).
11. Allows manager to select a view of all employees and adjust merit in view mode.

1. To enter merit, click the **Propose** icon  .

Overview of Merit Grid

This section includes two screen shots of the merit grid and descriptions of most fields. You can skip to [Enter Merit](#) for the steps to enter merit. Managers with subordinate managers can complete their merit entries. Skip to [Complete on Behalf](#) and enter merit for subordinate organizations.

Overall Budget and Spend

97%

1 Merit USD 57,267.00 of 59,056.74

Autofill 2

5 Items

Merit

| --Employee-- | A) Supervisory Organization | B) Performance Rating (if applicable) | C) Errors (in red) / Warnings (in orange) | D) Base Pay Current | E) Merit Target % | F) Merit Increase % | G) Merit Increase Amount | H) Merit Notes | I) Select Yes if no merit increase is awarded | J) Add'l Increase Reason - Choose Additional Responsibilities, Internal Equity Adjustment, Market Adjustment, Retention. This field is required even if no Adj % is given. Leave the default Internal Equity if no Adj % is entered |
|---|------------------------------|---------------------------------------|---|---------------------|-------------------|---------------------|--------------------------|----------------|---|---|
| <div>Employee Name</div> <div>Job Profile</div> <div>Supervisory Organization</div> | Sup Org Title (Manager Name) | Effective | | \$118,400.00 | 3.50% | 3.4628% | 4,100.00 | | No | Request Compensation Change > Salary Change > Internal Equity Adjustment |
| | A | B | C | D | E | F | G | H | I | J |

1. Percent adjusts as merit is entered.

2. Autofill button resets all calculations back to baseline of pool dollars%.

B. Feed of performance rating from appraisal, if a rating was entered. Column **B** is not visible for some grids.

C. Errors block submission. Warnings allow submission. Click the number to view the error/warning definition.

E. Pre-populated, baseline merit target.

F. Merit as entered by manager. Should align with performance rating in column **B** if a rating was entered.

G. System calculated dollar amount increase after merit Increase is entered.

H. Justification for merit of 0% or >10% merit.

I. Required selection of **YES** if no merit is awarded.

J. Select from the dropdown for increase beyond merit (see **Section 6** for instructions on selection).

NOTE: While the Merit Target (column E) may display a targeted baseline increase, check with your area's leadership for your school or units actual budget.

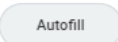
MRT: Enter Merit

- K.** Additional percent increase entered by manager. Column L will adjust automatically.
- L.** Additional dollar increase entered by manager. Column K will adjust automatically.
- M.** Enter justification for additional increase.
- N.** Proposed new pay after all increases are entered.
- O.** Percent amount entered by manager for a bonus.
- P.** Dollar amount entered by manager for a bonus.

| K) Add'l Increase % | L) Add'l Increase Amt | M) Add'l Increase Notes | N) *****New proposed pay amount after merit and add'l increase, if applicable | O) Merit Bonus % (if applicable) | P) Merit Bonus Amount (if applicable) |
|---------------------|-----------------------|-------------------------|---|----------------------------------|---------------------------------------|
| 1.5203% | 1,800.00 | | \$124,800.0000 | 0.00% | 0.00 |
| K | L | M | N | O | P |
| 0.00% | 0.00 | | \$108,600.0000 | 0.00% | 0.00 |
| 0.00% | 0.00 | | \$151,100.0000 | 0.00% | 0.00 |
| 0.00% | 0.00 | | \$161,200.0000 | 0.00% | 0.00 |
| 0.00% | 0.00 | | \$148,400.0000 | 0.00% | 0.00 |

Enter Merit

These steps are for entering merit for direct reports. To enter merit for subordinate organizations, skip to [Complete on Behalf](#). The subordinate manager will not be able to access their direct report's merit table when the manager's manager is Completing on Behalf.

- Do not click Submit until all employees have been adjusted.
 - Entries are saved once you click on a different row or tap the Enter key on your keyboard.
1. Click the  button above the grid to mass enter the standard merit increase. Dollars can be adjusted in accordance with your areas budgeted dollars. If ratings were used in the performance review, the merit will reflect the rating in column **F/G**.
 2. The icon above the table will react and update with the dollars spent for your supervisory organization's budgeted dollars.

MRT: Enter Merit

3. Click on a row for any employee to open for editing.
4. **Columns F and G** - Enter the percent or dollar amount. Entry in one column adjust the other. Do not include other compensation adjustments such as a bonus. This is entered elsewhere.
 - a. The budget graph above the grid also adjusts, depicting the dollars spent and total dollars in the budget pool.
 - b. The blue table to the right of the merit grid provides information on the individual's eligibiity and parameters for a merit increase.
5. **Column H** - A comment must be entered to support:
 - a. No merit increase.
 - b. Merit and/or additional compensation above 10%. You will receive an error warning in column C ♦ when going over 10% which dissapears when a note is added to column H.
6. **Column I** - If no merit will be awarded, select **YES**.
7. **Column J** – If providing an increase in addition to merit, click the drop down and search/scroll for the reason. Use only these reasons.
 - a. **Base Salary Change > Additional Responsibilities**
 - b. **Base Salary Change > Internal Equity Adjustment**
 - c. **Base Salary Change > Market Adjustment**
 - d. **Base Salary Change > Retention of Critical Talent**
8. **Columns K and L** – Enter the increase in either percent or dollar amount. Entry in one column adjust the other.
9. **Column M** – All comments to support additional merit should be entered in **Column H**.
10. **Column N** – Displays the proposed new pay once merit and adjustments are entered.
11. **Columns O and P** - Bonuses are included in the budget calculation.
12. Dollar amounts are rounded:

MRT: Enter Merit

- Nearest dollar for University Staff
- Nearest \$100 for Faculty

13. Click **Submit**. The table will route to the manager one level above in the management chain for approval. Managers must complete and submit merit calculations before the manager they report to has the ability to calculate their direct reports.

Complete on Behalf (mgr entering merit for subordinate mgr)

Managers with subordinate managers will receive additional features in the merit table. Subordinate managers must complete merit calculations before their managers can submit their own calculations. Alternatively, a manager can initiate the **Complete on Behalf** task, and enter merit for the subordinate manager. Initiating this step locks the subordinate manager from accessing the merit table and grid.

1. Click on the **Sub Org** icon  in the merit table.


| Sub Orgs | View | Propose | Activity | Status | Positions | Errors | Merit | Actions |
|---|---|--|---|-----------------|-----------|---|--------|-----------|
|  |  |  |  | Awaiting Action | 27 |  2 | 22.88% | Actions ▾ |

2. Click the **Actions** dropdown for the appropriate manager and click on **Complete on Behalf**.

| Sub Orgs | View | Activity | Status | Positions | Errors | Merit | Actions |
|---|---|---|-----------------|-----------|---|--------|--|
| |  |  | Awaiting Action | 10 | | 0.00% | Actions ▾ |
|  |  |  | Awaiting Action | 9 |  2 | 82.89% | Actions ▾ |
| |  |  | Awaiting Action | 8 | | 0.00% | View All Employees View Employees with Errors Search Employees Complete on Behalf |

3. Complete the acknowledgement that **Completing on Behalf** will lock out the subordinate manager. A comment must also be entered. Ownership can be handed back at any point by clicking on the Actions dropdown and selecting **Send Back**.

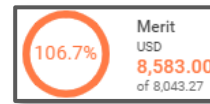
MRT: Enter Merit

4. Click [Complete on Behalf](#).
5. Click Done.
6. Repeat this process for each subordinate manager.
7. Go back to the merit table by clicking on the [Workday Inbox](#).
8. In the Merit table, click the **View** icon  to access all employees. Note that the budget pool now include the pool(s) from the subordinate organizations.
9. Follow the steps in the [Enter Merit](#) section.

Errors and Warnings

Workday will auto-populate the **Errors/Warning** column if any information in the table does not align.

- Errors appear as a red diamond with an number depicting how many errors. Errors must be corrected to submit.
- Warnings appear as yellow triangles with a number depicting how many warnings. Warnings must be read.
- Click on the number for an explanation.
- There is **NO** error or warning if the dollars spent is beyond the budget. However, the color of the budget graph will change to red.



Error Message – table will **not** move forward until corrected

Solution




MRT: Enter Merit

| | |
|--|---|
| Enter justification comment for merit increase = 0% | (Column H) Enter a comment in Merit Notes, justifying a 0% merit increase. |
| Enter justification comment for <u>merit</u> increase > 10% | (Column H) Enter a comment in Merit Notes, justifying the >10% increase. |
| Enter justification comment in the merit notes for <u>total</u> increase > 10% | (Column H) Enter a comment if the total of the merit increase % + the adjustment increase % + the bonus % is over 10%. |
| Merit Increase Percent is ZERO and Merit Zero Increase column is NO | (Column I) Change selection to Yes, if no merit increase is given. This is a double-check for giving a 0.00% merit increase and helps prevent inadvertently submitting if an increase was intended. |
| Merit Zero Increase is YES, and Merit Increase Percent is GREATER THAN Zero | (Column I) Change selection to NO if a merit increase is entered. |
| | |
| Warning Message – table will move forward upon message review | Solution |
| Proposed Base Pay Exceeds Compensation Grade Maximum | This message is an FYI that the proposed base pay is greater than the pay grade maximum amount for this employee. |

Reports: Export Merit Table or View Date of Last Pay Change

- University Staff Date of Last Pay Change:** Provides the date of the most recent pay change for employees.
- Merit Process – Employee Details – Shared Participation – UVA Combined Plans:** Spreadsheet of all employees within the supervisory organization for managers. The file includes fields in the merit table and space for documenting merit.
 - This report is not available for merit delegates. Please contact www.AskHR@virginia.edu to request the report.
 - This report is for teams who collaborate on merit. Recommended: decisions on merit should be entered in Workday merit tables vs. in the spreadsheet report.

MRT: Enter Merit

| | |
|---|---|
| Effective Date | MM / DD / YYYY  |
| Compensation Review Participation Event * | <div>× Merit: University Exempt Staff and A&P Faculty NOT SOM Merit Plan 2019 </div> |
| Organizations | <div>× CO-Chief HR Officer (Manager Name) </div> |
| Include Subordinate Organizations | <input checked="" type="checkbox"/> |

Effective Field – Do not enter a date

Compensation Review Participation Event – Select the table you wish to export to an Excel sheet. Tables can only be run individually, but can be combined when in Excel format

Organizations – Enter the highest level manager in the management chain (not the sup org title). Do not select org titles that include the letters JM. These are departments with wage/temporary staff.

Include Subordinate Organizations - Check to include all subordinate organization.

Additional Resources

- [Academic Division Merit Process 2023](#) - Website
- [Merit Guidelines](#)
- [Merit for University Managers and Delegates - Digital](#) course with video demonstrations
- AskHR@virginia.edu – Enter **Merit** in the subject line.