Quick Reference Guide

Overview
A web-based tool to model, approve, process salary increases for eligible employee roles.

Merit Increase Guidelines
https://www.hr.upenn.edu/myhr/payandperform/appraisal/merit

Salary Increase Modeling Link
https://salaryincrease.apps.upenn.edu

Terminology
Final Approver – This is the ‘top’ level individual in the School/Center who will approve the salary increases for all in their School/Center.

Modeling Manager (MM) – This is the individual just below the Final Approver who delegates ‘pools’ to various Pool Managers. MM may exclude, reassign, model and approve pools.

Pool Manager – This person is responsible for reviewing, modeling and/or further delegating the pool(s) assigned to them.

Employee Role – Faculty and Staff at Penn may have more than one role. In Modeling each ‘role’ is assigned to a pool.

‘Eligible’ Faculty and Staff are as follows:
• Employed on or before February 28, 2014
• Regular full-time, regular part-time, or limited service status

Key Dates
April 21, 2014 Modeling available
June 06, 2014 Modeling closes at 11:59 p.m.
June 11, 2014 Merit Inc Prog closes at 11:59 p.m.

*Action Generates e-mail to a Pool Manager

Review Pool
• From the Home page or Model and View Pools menu option, click the link or select the desired pool
  Important: Review ‘Employee Roles’ in your pool and the ‘Submit By’ date
  ➤ Once you delegate a pool, you can only ‘View’ the pool
• Note the Approval Summary
• Note the Pool Statistics
  ➤ Tip: Click on History to view the history of actions taken on this pool
  ➤ Review the following:
  ▫ Submit By
  ▫ Target % Change
  ▫ Target Amount Increase
  ▫ Current Salary Total
  ▫ Target Salary Total

Model Salary
• From the Model and View Salary menu option, choose from the following filters to select a pool:
  - Pool Name
  - Parent Pool
  - Pool Creator
  - Pool Manager
  - Employee
  ➤ Click on ‘Ready to model only’ to see only the pools available for modeling
• Under the Search Results, click on [Model]
  ➤ If you are not the current Modeler, you will only have ‘view’ access of the pool
• From the Model Pool page:
  - Select all employees and from the dropdown box, select
    Apply pool target % change
  - Adjust individual employees as required
  ➤ Continued in the next column above

Model Salary (cont’d)
• From the Home menu option
• Under Modeling, click on a hyperlinked pool
  ➤ The ‘hyperlink’ lets you know the delegated pool is available for modeling and/or approval
• Review the pool
  - Adjust salaries using modeling
• Click on [Submit for Approval]

Approve Pool*
• From the Home menu option
• Under Modeling, click on a hyperlinked pool
• The ‘hyperlink’ lets you know the delegated pool is available for modeling and/or approval
• Review the pool
• Click on [Submit for Approval]

Recommendation: The Pool Manager should wait until all of their ‘delegated’ pools are returned before submitting to their Approver.

Reject Pool*
• From the Home menu option
• Under Modeling, click on a hyperlinked pool you delegated
• Review the pool; add notes if desired
• Click on [Reject]
  ➤ Communicate with the Pool Manager why the pool is being rejected

*Note the ‘Pool Statistics’
  ▫ # Entered
  ▫ Actual % Change
  ▫ Actual Amount Increase
  ▫ Available Amount
  ▫ Entered Total Salary

• Click on [Save as Draft] often
• Continue adjusting salaries until the Available Amount is zero (0)
  ➤ Click on Edit under Justifications to add a reason if a salary increase is outside of University guidelines
  ➤ Optional: Click on Edit under Notes to add additional information as desired
  ➤ Optional: Enter an internal rating in Sort, such as E for Exceed or 1, 2, 3, etc. as desired
• When modeling completed, click on [Submit for Approval]
Create/Delegate Pool*

- From the **Define My Pools** menu option, select desired pool
- Click on [Create Pool]
- Enter a **Pool Name**
  Tip: May want to establish a naming convention for your pools
- Select **Manager**
  Tip: The Manager does not need to be a PennWorks user
- Select/deselect **Manager may view ratings**
- Enter/change **Model by date**
- Review/edit the **Target % Increase**
- Click on [Add Employee Roles to Pool]
- Filter and [Find] the desired employee roles
- Select the employee role(s) for the pool
- Click on [Add Selected to Pool]
- Click on [Back to Pool]
- Click on [Submit]

**Exclusions**

For Final Approver & Modeling Manager Only

- From the **Model and View Pools** menu option, select desired pool
- Click on [Model] or [View] the pool depending on who is in control of the pool
- Select the employee role(s) for the pool
- From the dropdown box, select
  - **Exclude from modeling**
- Click on [Apply to Selected]
  Tip: You will receive a Validate Warning explaining the role will be removed, target amount increase recalculated, etc.
- Click on [Submit Anyway]
  These employee’s roles will appear on the Define My Pools page at the bottom
- To ‘include’ these roles, from the **Define My Pools** menu option,
  - Click on the link under Exclusions
  - Select those employee roles to ‘include’
  - Click on [Include Selected]

**Create Pool**

- From the **Define My Pools** menu option, review the following:
  - Submit by
  - # Emp Roles vs. To Be Entered
  - Target % vs. Actual % Change
  - Target vs. Entered Salary
  - Difference

**Update Pool**

- From the **Define My Pools** menu option
- Under **My Pools**, click on the pool link desired
- Update the Pool Name, Manager, Date, Target % Increase or Target Amount Increase
- Click on [Submit]
  Tip: They may also add or remove employee roles assigned to the pool

**Delete Pool**

- From the **Define My Pools** menu option
- Select the desired pool
- Click on [Delete]
  Employee Roles return to pool from which they were delegated

**Role Reassignment**

- From the **Model and View Pools** menu option
- Select the employee role(s) to be returned to the pool from which they were delegated
- From the dropdown box, select
  - **Remove for pool reassignment**
- Click on [Apply to Selected]
- Review Validation Warning
  Tip: Go to Update Pool to move role to another pool

*Action Generates e-mail to a Pool Manager

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**Define My Pools**

- From the **Home** menu option
- Under the **Pools I Manage**, click on the pool link desired
  - Optional: You can choose to ‘Remove for reassignment’ an employee role(s)
  - Optional: Modeling Managers can ‘Exclude Pool Members’ from here also

**View individual History**

- From the **Model Pool** or **View Pool** pages
- Click on the **Role** for the desired employee
- The following information is available:
  - Appt Hours
  - Years in Role
  - Status
  - History of the pool activity
  - Pay and Ratings History

**Query**

- From the **Query** menu option
- Click on [Find] to see all employee roles in your pool(s) or filter as desired and click on [Find]
- Review such fields as:
  - New Salary (Draft)
  - New Salary (Submitted)
  - Current Modeler
  - Last Updated By

**Export**

- New for FY14, users have the ability to Export Modeling data to an excel spreadsheet

**Resources/Help**

Reference Material
http://www.finance.upenn.edu/ftd/documentation.shtml#salinc

Help/Questions
askcompensation@hr.upenn.edu
215-746-HELP