

## Quick Reference Guide

### Overview

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

#### Salary Increase Modeling Link

<https://medley.isc-seo.upenn.edu/salaryIncrease/jsp/fast2.do>

### 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 **the end of February each year** – check the **Merit Increase Guideline for the exact date**.
- Regular full-time, regular part-time, or limited service status

**\*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 
  - Adjust individual employees as required

*Continued in the next column above*

### Model Salary (cont’d)

- 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]**

### 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
  - Adjust salaries using modeling
- 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*

## Create/Delegate Pool\*

- From the **Define My Pools** menu option
- 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]**

- Home
- Define My Pools
- Model and View Pools
- Query

## 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]**

## Determine Pool Status

- 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]**
  - ☞ *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*

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## View Pool

- 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

### Human Resources

<https://www.hr.upenn.edu/>

Type in Search: Merit Increase Program

### Reference Material

<http://www.finance.upenn.edu/ftd/documentation.shtml#salinc>