Approving a Pool

Updated 04/27/18

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

Model Salary

- 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 (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]

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]

**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]

Define My Pools
- 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

Determine Pool Status

- 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

Update Pool*

- From the **Define My Pools** menu option
- Under My Pools, click on the pool link desired
- Update the Pool Name, Manager, Date, and 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

*Action generates e-mail to a Pool Manager

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