The following instructions will guide you through the process to enter merit recommendations in the Fusion Merit Tool.

1. Log in to the Fusion Merit Tool using your UTHealth credentials: go.uth.edu/fusion
2. To open your merit plan worksheet:

2a. Click the Merit Worksheet button on the left side of the screen to access your merit worksheet(s).

2b. Click the link under the Primary Managed Plans section of the screen to view the merit worksheet.

- There are two merit plans:
  - **FY2016 Semi-Monthly Classified Merit Plan- March**—contains all classified employees that meet the eligibility requirements for March merits.
  - **FY2016 Bi-Weekly Classified (Practice Plan) Merit Plan FY2016- March**—contains non-exempt employees in a Practice Plan job code who meet the eligibility requirements for March merits.

- The merit plan links you will see depends on whether you have direct and/or indirect reports eligible for a merit within those plans.

- You may see one or both links.
3. By default, **only** your direct reports will appear on the merit worksheet.
   - Click the dropdown arrow of the **Team** menu located above the **Current Annualized Salary** column.
   - Identify anyone on the list that will not be entering merits in the tool.
   - Check the box next to the name of any manager for whom you will be entering merits.
     - This will display their direct reports on the merit worksheet so you can enter their merits.
     - **Note:** If you are responsible for entering merits for every employee, select the “All” box.

**Tips:**

**Are you entering merits for everyone in your organization?**

- Click the “All” box under the **Team** menu if you are entering merits for everyone in your organization.

**Do you need to enlarge the worksheet to see all employees listed without scrolling?**

- Click the **Detach** button to maximize the view of the table.
- Click the **X** in the right hand corner of the detached table to close it.
- There is **no Save** button. You will not lose your work. The detached table will minimize and any entries will be saved.
4. Verify that all appropriate employees are showing on the worksheet. If you are missing employees, please review the Merit Eligibility and Guidelines.

5. Validate that all employees’ performance ratings are in the system.

Performance ratings already in the system will appear here in the Performance Rating column.
6. Select a performance rating for any employee that is missing a rating from the Enterable Performance Rating column.

From the drop down menu, select one of the following Performance Rating Options:

<table>
<thead>
<tr>
<th>Performance Rating Options</th>
<th>Eligible for merit increase?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exceptional</td>
<td>Eligible</td>
</tr>
<tr>
<td>Exceeds Expectations</td>
<td>Eligible</td>
</tr>
<tr>
<td>Fully Meets Expectations</td>
<td>Eligible</td>
</tr>
<tr>
<td>Improvement Needed</td>
<td>Not Eligible</td>
</tr>
<tr>
<td>Unsatisfactory</td>
<td>Not Eligible</td>
</tr>
<tr>
<td>Not Applicable</td>
<td>Not Eligible</td>
</tr>
</tbody>
</table>

**Note:** Employees must have a current annual performance appraisal conducted in the last 12 months on file with a performance rating of “fully meets expectations” or better.
7. Enter the recommended merit percentage increase in the Manager Entered Merit % column.

8. If the merit increase places the new annual rate over the pay range maximum, the coverage will appear as a lump sum amount in the Lump Sum Merit column.
9. Lump Sums Only—you must select Yes or No from the Will LSM have the same funding source column. This is different from previous years. You only need to submit a One Time Payment Form or PASS transaction if you are changing the funding source for the lump sum.

- Selecting “Yes” – A One Time Payment/PASS transaction form is not required. The lump sum will be funded in accordance with regular payroll.

- Selecting “No” – A One Time Payment or PASS transaction form must be submitted to SDR if there is a funding source change. Follow your current process for submitting PeopleSoft changes to SDR. There are directions on the Fusion homepage for how to use PASS transactions (if applicable).
10. Review and correct any outstanding alerts if applicable.

- Hover over the alert icon to view the reason for the alert and instructions on how to resolve the issue.
- A red circle with a white X indicates a “hard stop.” You cannot save the worksheet until you resolve the alert.
- A red circle with a diagonal line also indicates a “hard stop.” You cannot submit the worksheet until you resolve the alert.
- A yellow triangle with an exclamation point is a warning letting you know that the Manager Entered Merit % column is blank. You can still save and/or submit the worksheet.
11. Click the **Save** button when you have finished completing the merit worksheet.
   - Do not submit the worksheet yet.

12. Click the **Manage Approvals** tab located at the top of the **Compensate Workforce: FY2016 Classified Merit Increase Plan FY2016 - March** screen.
Did you complete merit entries for all employees in your organization?

- If yes, follow instructions for **Step A**.
- If you did not complete merit entries for all employees in your organization, follow instructions for **Step B**.

**Step A:**

- Click the dropdown arrow next to the **Approve** button and select “**All Managers**.”
- This is granting you the ability to enter and submit merits for approval for all the managers listed.
Step B:

- Highlight (by clicking on) each manager’s name that you entered merits for. By holding down the Control key and clicking on each name, you can select more than one at a time.
- Click the dropdown arrow next to the Approve button and click on Selected Managers.
- **Note:** You will not be able to submit your worksheet to the next level for approval until you have received and approved all merit worksheets from the managers that are entering their own merits.

When you receive merit worksheets for approval from the managers that are entering merits, refer to the “Approving Merit Increases” job aid on the Merit Tool home page. (Click Home in upper left corner of the screen and click the orange button Instructions for Merit Approvers.

The Approval Status column will be populated once the merit worksheets have been approved. This needs to be populated for all managers to advance to the next step.
13. Save and submit the worksheet when completed.

** You will not be able to submit your worksheet until you have approved all of your manager direct report merit worksheets.

- Click the **Save** button and then the **Submit** button at the top right side of the screen.
- A comment box will open. You may enter a comment or leave blank.
- Click **Submit** to close the comment box.
- A confirmation box will open.
- Click **OK** to confirm.
  - The approver will be alerted that the worksheet is ready for approval.
  - This concludes the manager submission process.
Entering Merit Recommendations

You may enter comments before you submit the worksheet to the approver or leave blank.

Click Submit to close the comment box.

Click OK to confirm your worksheet was submitted for approval.
14. You may withdraw submission of the worksheet to make changes if it has not already been approved at the next level.

➢ Click **Withdraw Submission**.

15. Click **Done** to return to the **Primary Managed Plans** section.

➢ It is not necessary to click **Done**; however, if you are responsible for multiple plans, clicking **Done** takes you back to the **Primary Managed Plans** screen so you can complete another merit worksheet.