



Merit Matrix - Supervisor Access

To access Compease Starter, you will log in to your Performance Pro account. On the top right-hand side, you will see a group of icons. Click the Compease icon and it will take you to the site.



To access your Employee Data for direct reports and downline reporting structure, go to **Manage Data>Employee Data**.

Please note you will only have READ ONLY access to this information.

A screenshot of the 'Employee Data' interface. The left sidebar shows a menu with 'Employee Data' selected. The main content area has a blue header 'Employee Data' and a 'Filter By' section with 'Job Title' selected. Below are search fields for 'Search For' (set to 'All') and 'Select Employee' (set to 'All, Carole'). A red 'Read Only' label is at the bottom.

Merit Increase Planning

You will be able to view, make comments and merit adjustments for your direct reports and downline reporting structure.

Choose **Merit Planning > Select Merit Model > Choose Merit Increase Effective Year**. Click on the Merit Plan description to enter the Merit Plan.

Welcome Laurent (logged in as Inaworski@westfieldbank.com)

Merit Model

Select Merit Increase Model

Increase Effective Year: 2023

VERSION	DESCRIPTION
1	2023 Merit Increase

The Matrix will populate, and you will be able to view the Additional Discretionary % should this be necessary.

Merit Model Year: 2023 Version: 1 Description: 2023 Merit Increase

View Matrix

Performance Level	Compa Ratio Range					Additional Discretionary %
	1 0.00% - 91.00%	2 91.01% - 97.00%	3 97.01% - 103.00%	4 103.01% - 109.00%	5 109.01% - 999.00%	
High Performer	4.25%	4.25%	4.25%	4.25%	4.25%	10.00%
Valued Performer	3.75%	3.75%	3.75%	3.75%	3.75%	10.00%
Contributor	3.00%	3.00%	3.00%	3.00%	3.00%	10.00%
Needs Improvement	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Unacceptable	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%

Choose **Calculate Increase > View Employees**. Check box to view hourly employees with an hourly pay rate.

Role: Supervisor

Calculate Merit Increase Year: 2022 Version: 65 Description: merit test

View Pay Rate as Hourly View: All

Overall Summary:	Total Employees	Budget	Total Used	Balance	My Overall Summary:	Total Employees	Budget	Total Used	Balance
	15	\$10,000.00	\$5,369.79	\$4,630.21		15	\$10,000.00	\$5,369.79	\$4,630.21

EMPLOYEE NAME	PL	PAY RATE	CR	MERIT %	MERIT \$	NEW %	NEW \$	LUMP SUM %	LUMP SUM \$	NEW PAY RATE	NEW CR	SPVR CMNT	RESET
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You will see your reporting structure but will only have access to adjust your direct reports until the downline Supervisors have made their merit recommendations and clicked Finished. Once the downline Supervisor has clicked Finish, the employee information will open for the upline Supervisor to view the suggested merit, make additional adjustments and comments, or leave as is.

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View Pay Rate as Hourly View: All

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EMPLOYEE NAME	PL	PAY RATE	CR	MERIT %	MERIT \$	NEW %	NEW \$	LUMP SUM %	LUMP SUM \$	NEW PAY RATE	NEW CR	SPVR CMNT	RESET
Bishop, Kyle	5	\$158,581.69	114.50%	3.50%	\$5,550.36	9.1670%	\$14,537.211	4.33%	\$6,871.32	\$173,118.91	125.00%		
Amanda, Special B	4	\$17.50	108.15%	3.75%	\$0.66			0.00%	\$0.00	\$17.50	108.15%		
Candle, Holden	5	\$18.07	111.69%	3.50%	\$0.63			0.00%	\$0.00	\$18.70	115.60%		
Lighting, Mack	2	\$19.05	94.93%	4.25%	\$0.81			0.00%	\$0.00	\$19.86	98.97%		
Peach, Georgia	3	\$26.05	103.74%	2.50%	\$0.65			0.00%	\$0.00	\$26.71	106.33%		

The employee record can be opened by clicking the + icon next to the employee's name. Click the x to collapse the employee record.

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Candle, Holden	5	\$18.07	111.69%	3.50%	\$0.63			0.00%	\$0.00	\$18.70	115.60%		

Employee ID	200174	Job Title	Teller	Department	Branch Ops
Last Increase Amount	\$916.80	Hire Date	09/20/2017	In Position Date	09/20/2017
Last Increase Date	01/01/2021	Next Increase Date	01/01/2022	Pay Basis	Hourly
Pay Frequency	Bi-Weekly	Pay Status	Full-Time	Weekly Hours	40
Compa Ratio Range	111.6900%	Grade	4	Months Since Last Increase	12
Project Payroll Expense	\$38,904.3252	Base Percent Increase	3.5000%	Base Salary Increase	\$1,315.6052
Base Hourly Increase	\$0.6325				

If appropriate, to make an adjustment to the employee's merit increase, enter a new percent or a new dollar amount in the appropriate field.

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Lighting, Mack	2	\$19.05	94.93%	4.25%	\$0.81			0.00%	\$0.00	\$19.86	98.97%		

Merit Planning will track the amount of funds a supervisor has used. The system will not allow you to go over the additional discretionary percent assigned on the matrix. If a budget was set, the plan will not allow you to exceed your total budget.

Calculate Merit Increase Year: 2022 Version: 65 Description: merit test

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Bishop, Kyle	5	\$158,581.69	114.50%	3.50%	\$0.63			4.33%	\$6,871.32	\$173,118.91	125.00%		
Amanola, Special B	4	\$17.50	108.15%					0.00%	\$0.00	\$17.50	108.15%		
Candle, Holden	5	\$18.07	111.69%	3.50%	\$0.63			N/A	N/A	\$18.70	115.60%		

Error:

Your percent increase of 15.0000% for Candle, Holden exceeded the matrix limit of 13.5000%. Please try again.

To make a comment about your employee, click on the comment icon in the SPVR CMNT column. A window will populate for your comment.

Calculate Merit Increase Year: 2022 Version: 65 Description: merit test

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Candle, Holden	5	\$18.07	111.69%	3.50%	\$0.63			N/A	N/A	\$18.70	115.60%		

Write your comment

Outstanding employee

Ok

The comment icon is now blue. Click on icon to review or edit your comment.

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View Pay Rate as Hourly View: All

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Candle, Holden	5	\$18.07	111.69%	3.50%	\$0.63			N/A	N/A	\$18.70	115.60%		

When you have made all edits to all your employees or if your employees are all set, click FINISH. Once you have clicked Finish, you will still be able to view your plan, but the plan will be locked from making any further changes. If changes need to be made after, please contact your Company Administrator.

Calculate Merit Increase Year: 2022 Version: 65 Description: merit test

View Pay Rate as Hourly View: My Direct Reports

Overall Summary:	Total Employees	Budget	Total Used	Balance	My Direct Report Summary:	Total Employees	Budget	Total Used	Balance
	15	\$10,000.00	\$5,369.79	\$4,630.21		2	\$10,000.00	\$5,369.79	\$4,630.21

EMPLOYEE NAME	PL	PAY RATE	CR	MERIT %	MERIT \$	NEW %	NEW \$	LUMP SUM %	LUMP SUM \$	NEW PAY RATE	NEW CR	SPVR CMNT	RESET
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⊙ Space, Cindy	3	\$89,496.43	102.17%	4.00%	\$3,579.86	10.0000%	\$8,949.6430	0.00%	\$0.00	\$98,446.07	112.38%	⊞	⊞

Finish

You will have access to Merit Reports for your direct report and/or reporting structure, before and after the Merit Planning has been marked as Finished. Reports available are:

- Merit Plan Report
- Employee Pay Change Notification
- Employee Base Salary Statement

