



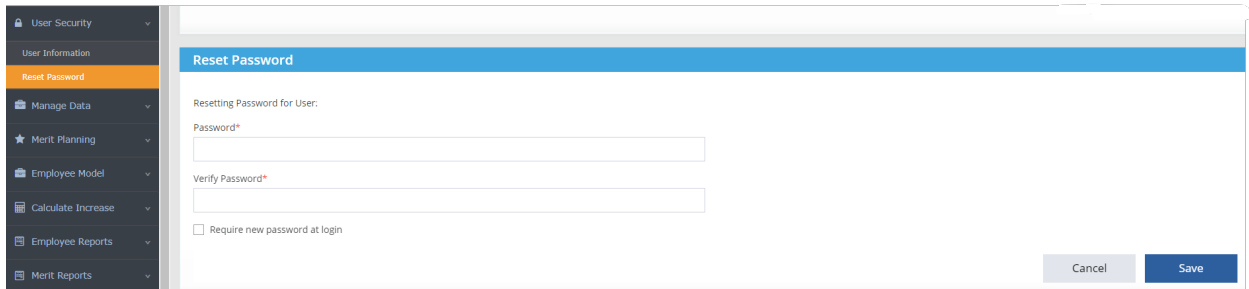
Compease[®] Starter

Merit Matrix - Supervisor Access

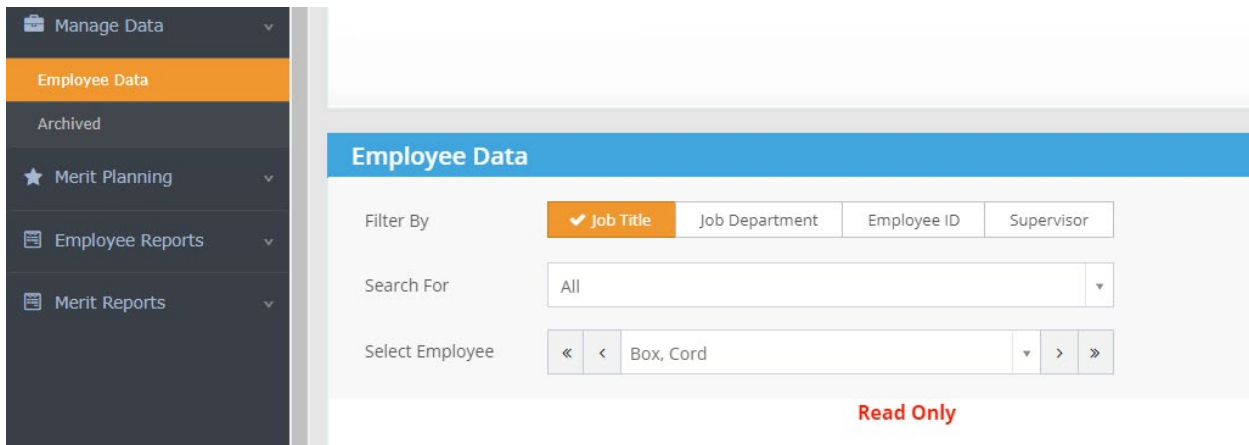
The first time you log in, you will be asked to reset your password. Enter new password > Verify > Save. Do not check the box that states, “Require new password at login” or you will be in a loop of changing your password”.

The password requirements are as follows:

1. At least 8 characters
2. 1 upper case letter
3. 1 lower case letter
4. 1 number



To access your Employee Data for direct reports and downline reporting structure, you will go to **Manage Data > Employee Data**. Please note you will only have READ ONLY access to this information.



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.

Role: Supervisor

Merit Model

Select Merit Increase Model

Increase Effective Year*
2023

VERSION	DESCRIPTION
1	Merit Planning

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

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	7.50%	6.00%	4.50%	3.00%	1.50%	10.00%
Valued Performer	6.25%	4.75%	3.25%	1.75%	0.25%	10.00%
Contributor	5.00%	3.50%	2.00%	0.50%	0.00%	10.00%
Needs Improvement	3.75%	2.25%	0.75%	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.

Calculate Merit Increase														Year: 2022 Version: 65 Description: merit test							
View Pay Rate as Hourly <input checked="" type="checkbox"/>		View: <input type="text" value="All"/>		Total Employees		Budget		Total Used		Balance		My Overall Summary:		Total Employees		Budget		Total Used		Balance	
Overall Summary:		15		\$10,000.00		\$5,369.79		\$4,630.21		My Overall Summary:		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								
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.

Calculate Merit Increase														Year: 2022 Version: 65 Description: merit test							
View Pay Rate as Hourly <input checked="" type="checkbox"/>		View: <input type="text" value="All"/>		Total Employees		Budget		Total Used		Balance		My Overall Summary:		Total Employees		Budget		Total Used		Balance	
Overall Summary:		15		\$10,000.00		\$5,369.79		\$4,630.21		My Overall Summary:		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								
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%										
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.

Calculate Merit Increase														Year: 2022 Version: 65 Description: merit test							
View Pay Rate as Hourly <input checked="" type="checkbox"/>		View: <input type="text" value="All"/>		Total Employees		Budget		Total Used		Balance		My Overall Summary:		Total Employees		Budget		Total Used		Balance	
Overall Summary:		15		\$10,000.00		\$5,369.79		\$4,630.21		My Overall Summary:		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								
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%										

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	
View Pay Rate as Hourly <input checked="" type="checkbox"/> 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					LUMP SUM %	LUMP SUM \$	NEW PAY RATE	NEW CR	SPVR CMNT	RESET
Bishop, Kyle	5	\$158,581.69	114.5					4.33%	\$6,871.32	\$173,118.91	125.00%		
Amanda, Special B	4	\$17.50	108.1					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	
View Pay Rate as Hourly <input checked="" type="checkbox"/> 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					LUMP SUM %	LUMP SUM \$	NEW PAY RATE	NEW CR	SPVR CMNT	RESET
Bishop, Kyle	5	\$158,581.69	114.5					4.33%	\$6,871.32	\$173,118.91	125.00%		
Amanda, Special B	4	\$17.50	108.1					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%		

Write your comment
Outstanding employee

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

Calculate Merit Increase												Year: 2022 Version: 65 Description: merit test	
View Pay Rate as Hourly <input checked="" type="checkbox"/> 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
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			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 once finished, 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
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%		
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

