# Compease®

# Merit Planning
# Supervisor Access

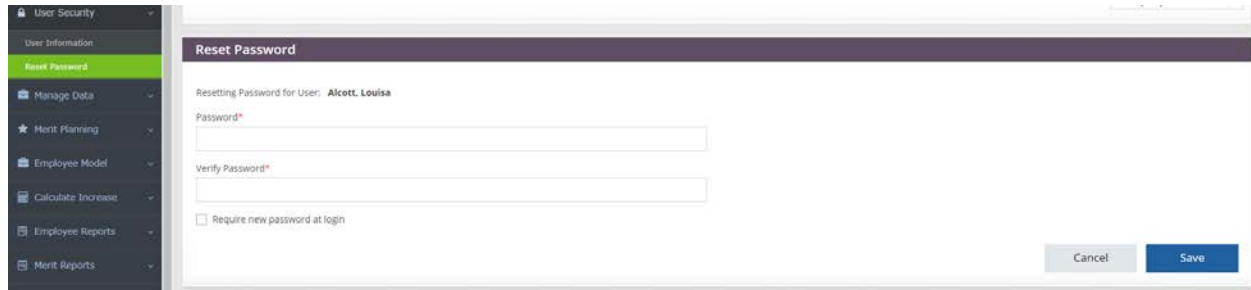**HR** PERFORMANCE SOLUTIONS

The first time a supervisor logs in they will be asked to reset your password. Enter new password>Verify>Save. Do not check the box that states, "require new password at log in or you will be in a loop of changing your password".
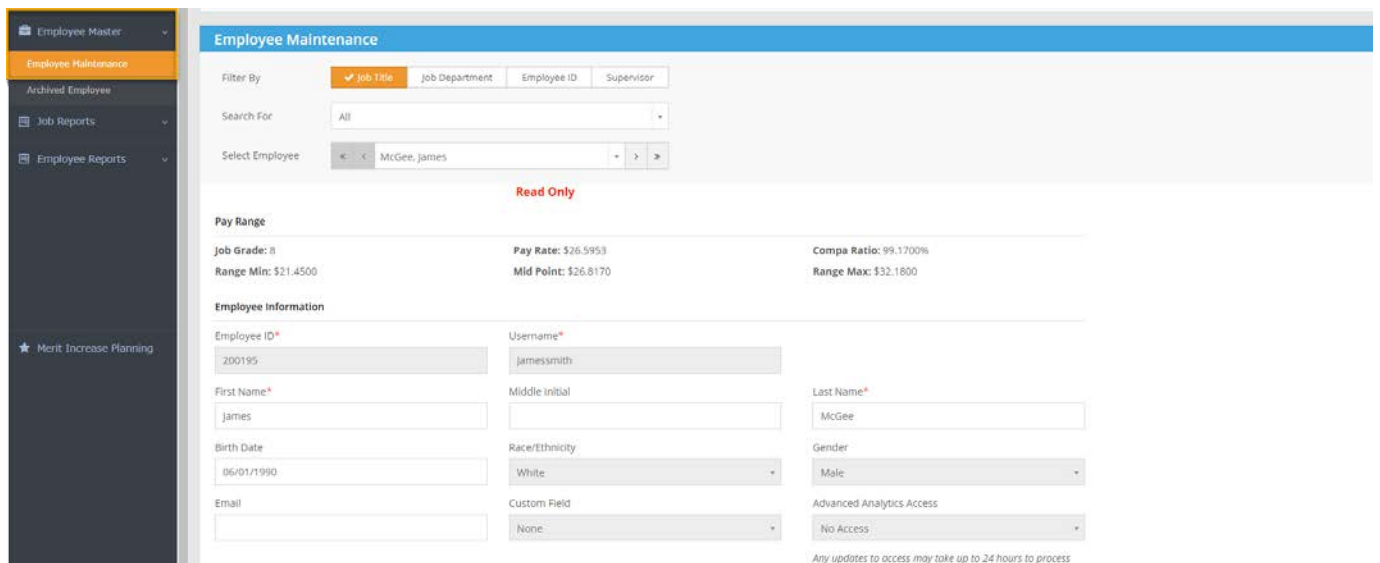
The password requirements are as follows:

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, go to **Employee Master>Employee Maintenane.**
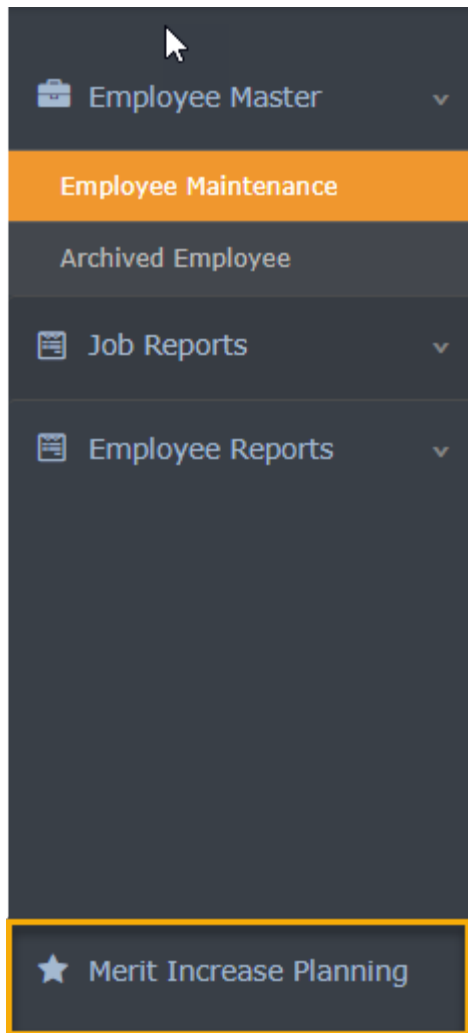
Please note you will only have READ ONLY access to this information.

# Merit Increase Planning

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

Choose **Merit Increase Planning** on your tool bar.

Select **Merit Model >Select Model>** Choose Merit Increase Effective Year. Click on the Merit

Plan description to enter the Merit Plan.
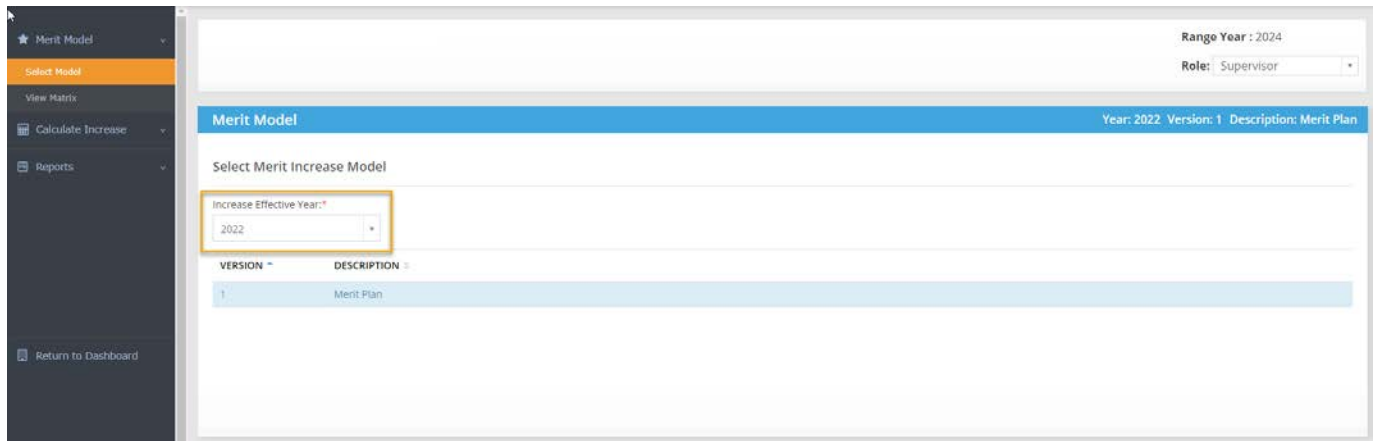


The Matrix will populate, and you will be able to view the Additional Discretionary % should this be necessary.



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

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.



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



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.

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.



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



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

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.



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
- Supervisor Report