

# Merit Configuration Worksheet



This worksheet is for System Members to indicate how the Merit Process will be configured for their use. Once complete and signed, forward the worksheet to Workday Services at [support@tamus.edu](mailto:support@tamus.edu).

<b>System Member</b> (System Member Part and Company abbreviation)	
<b>Merit Configuration Type</b> (who receives inbox task)	
<b>Merit Entry Option</b>	
<b>Top Level Supervisory Organization Name</b>	
<b>Primary Contact person name and title</b>	
<b>Primary Contact person email</b>	

## Section A – Merit Plan Eligibility

Review the below eligibility criteria below and check the appropriate boxes as needed.

Eligibility Criteria	Options
Employee Types (check all that apply)	<input type="checkbox"/> Staff <input type="checkbox"/> Faculty <input type="checkbox"/> Adjunct (as defined by TRS) – Use the “Job Catalog” report to see the job profiles in this category
Assign Merit Plan on Additional Jobs	<input type="checkbox"/> Yes <input type="checkbox"/> No
One-time merit lump sum payments	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Section B - Merit Pools and Target Percentage

<b>Will you use the calculated Merit Pools for Merit Pool Authority?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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If yes, provide the Target % below accordingly. Merit Pools will calculate based on the Target % and compensation at the Compensation Snapshot Date.

Employee Type	Staff	Faculty
Target %		

<b>Will you use separate Pools for other awards such as promotion, additional adjustment and merit lump sum?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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## Section C – Merit Process Dates

<b>Initiation Date</b>	
<b>Launch Date</b>	
<b>Finalization Date</b>	
<b>Effective Date</b> (if Merit will not be effective 9/01, provide alternative Effective Date)	
<b>Visibility Date</b> (if visibility will be prior to default of Effective Date, provide alternative date)	

## Section D - Performance Reviews

<b>Will you use Workday to do annual performance reviews for this process?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
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If yes, please provide the review template names for both faculty and staff.

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## Section E - Parallel Events at Launch

Message to be sent to the staff who is listed as "awaiting action" at launch for employees who have an in-progress staffing event (select one):

- Send the default message in Workday to each person awaiting action:

Default Message: "You have an in-progress event for an employee which should be completed or canceled prior to launching our annual merit process. Please complete or cancel this process by [Cancellation Date]. If it is still in progress as of that date, we may cancel the event. If you have questions, please contact your HR Partner or HR Contact for assistance."

- Do not send the default message (Member will handle communications within their organization)

## Section F – Merit Statement (Unavailable if using EIB option)

Will you use the available Workday Merit Statement?	Yes No
If yes, what date after the Finalization Date, but before the Effective Date, do you want the Merit Statements to be available?	
If you are using Merit Statements, what type of statement would you like to use?	With Percentages Without Percentages
If you are using Merit Statements, would you like to send an automated notification to employees, once the statements are released?	Yes No

## Section G – Merit Partner Security Role Assignments

Use Addendum A (page 3) to list employees who will assist with the Merit Process and be assigned the Merit Partner role. Each employee must also complete the customized Statement of Responsibility for Merit Partner form.

### Requested and Approved by:

<b>Name</b>	
<b>Title</b>	
<b>Date</b>	

***The requestor must have authority by the System Member to authorize use of Workday Merit. It is the requestor's responsibility to assure employees who are a Manager, HR Partner, Payroll Partner and/or Merit Partner are aware of the actions being done through the Merit Process and are provided appropriate communications and training to perform duties in the Merit Process***

