



Getting Started Guide for Delegates



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What is included in the Getting Started Guide for Delegates?

This Getting Started Guide will advise delegates on how they can gain access to SimplyMerit and act as a delegate for other managers. Should additional questions arise after reviewing this guide, please review the *Getting Started Guide for Managers* and/or contact your HR Administrator. You can directly contact your organization's HR Administrator by clicking the "Contact Support" link at the bottom of the SimplyMerit application pages.

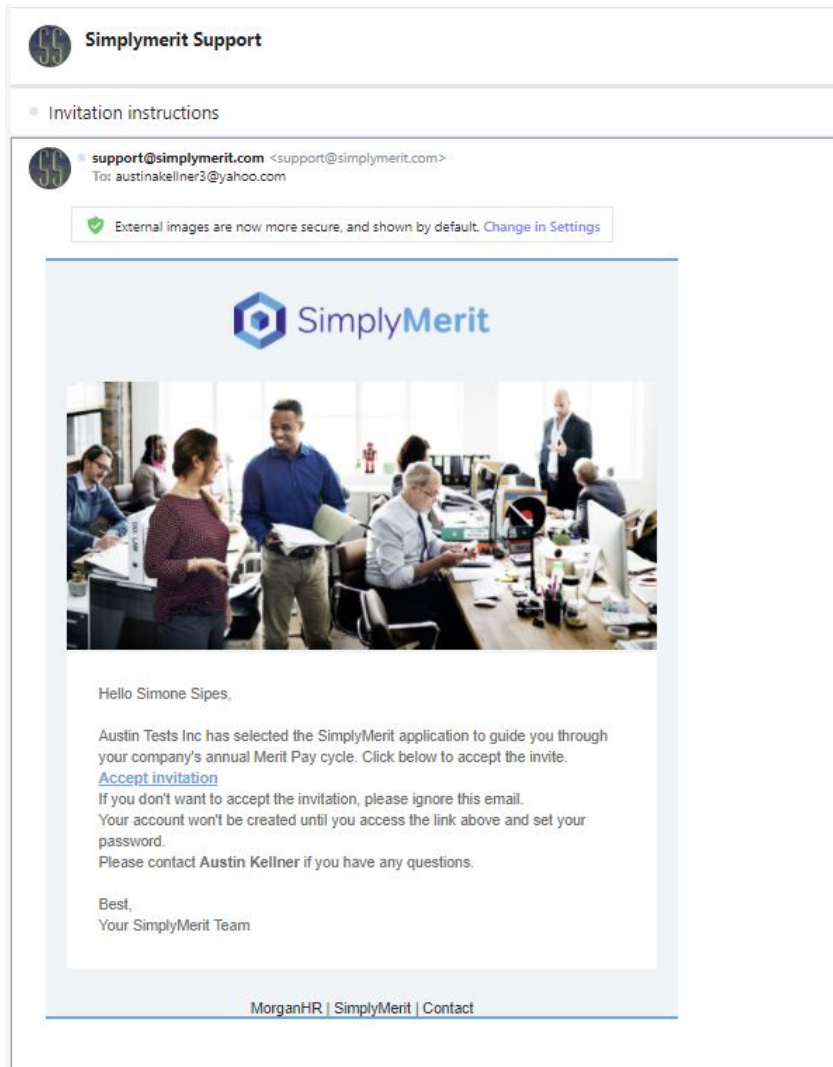
Getting Started with SimplyMerit

What is SimplyMerit? How does it work?

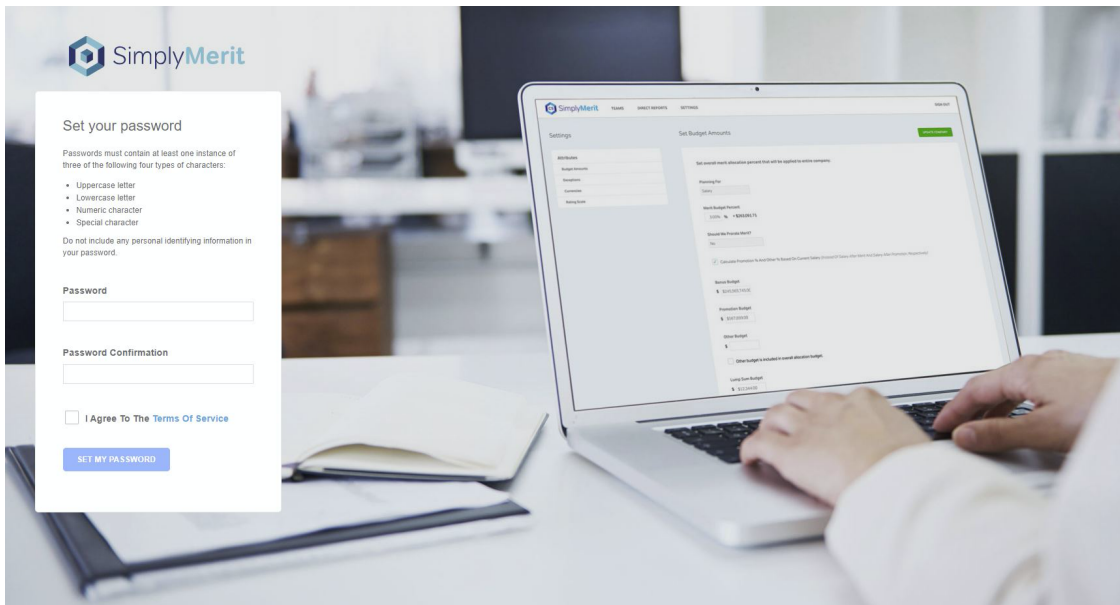
SimplyMerit is a cloud-based compensation planning solution that focuses on base salary adjustments, bonus allocations, promotions, lump sum payments, and equity. SimplyMerit provides companies the ability to manage their annual merit pay processes simply and easily in an intuitive interface. Because SimplyMerit is entirely cloud-based, there is no software to download or install. Secure access to the application is available anywhere on virtually any device including smartphones and tablets.

Gaining Access to SimplyMerit for the First Time

1. After receiving the “Invitation instructions” email from Support@SimplyMerit.com, select the “Accept Invitation” link within the email’s body of text to start the process of creating a password.



2. Follow the instructions on screen to establish a password.



Subsequent Logins

After successfully creating a password to login, SimplyMerit can be accessed at any time by navigating to <https://app.simplymerit.com>.

SimplyMerit's Three Main Screens

SimplyMerit has three different screens that a delegate might experience when they login to the application. The three main screens are the “My Org” view, the “My Team” view, and the “My Account” view. The screen a delegate sees by default when initially logging in is determined by the delegate’s role and responsibilities within the organization.

My Org

The “**My Org**” tab is the default login view for managers that oversee multiple teams. The hierarchy is composed of the manager’s direct and indirect reports within their span of control. Therefore, the **My Org** screen can show summary and detailed information for all of a manager’s direct and indirect reports.

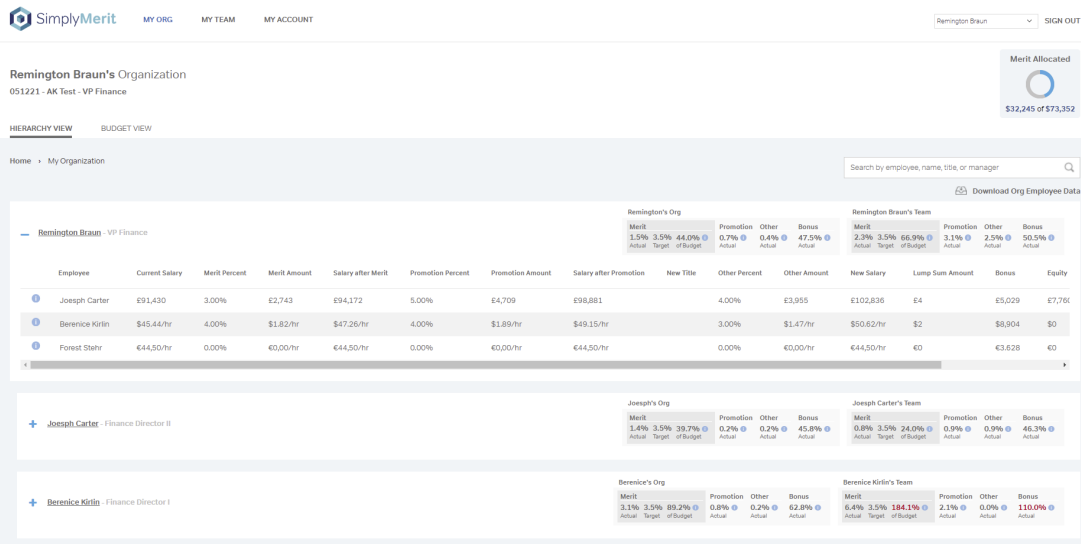
The screenshot displays the 'My Org' interface for Remington Braun's Organization (051221 - AK Test - VP Finance). The top navigation bar includes 'SimplyMerit', 'MY ORG', 'MY TEAM', and 'MY ACCOUNT'. A user profile for Remington Braun is shown in the top right corner. The main content area is titled 'Remington Braun's Organization' and features a 'Hierarchy View' tab. Below this, a search bar and a 'Download Org Employee Data' link are visible. The central part of the screen shows a hierarchical tree structure with three main branches: Remington Braun - VP Finance, Joseph Carter - Finance Director II, and Berenice Kirlin - Finance Director I. Each branch has a summary box showing 'Merit' (Actual, Target, Budget), 'Promotion' (Actual), 'Other' (Actual), and 'Bonus' (Actual). The 'Remington Braun - VP Finance' branch is expanded, showing a table of employees with columns for Employee, Current Salary, Merit Percent, Merit Amount, Salary after Merit, Promotion Percent, Promotion Amount, Salary after Promotion, New Title, Other Percent, Other Amount, New Salary, Lump Sum Amount, Bonus, and Equity. The table lists three employees: Joseph Carter, Berenice Kirlin, and Forest Stehr. Below the table, there are summary boxes for each of the three branches, showing their respective 'Merit' and 'Promotion' data.

My Org – Hierarchy View and Budget View

If serving as a delegate for a manager that has access to a “My Org” tab, the My Org screen presents information related to a manager’s direct and indirect reports. You can see summary boxes across each manager, details for each employee, along with status information and alerts. The approval workflow engine is also built into the My Org screen.

The **Hierarchy View** allows you to navigate a manager’s reporting hierarchy to view summary and detailed information. It is also the workflow engine for the approval process. Any pending approval requests for salary adjustments, bonus allocations, and/or equity grants appear as yellow rectangles under the requesting manager’s name.

The **Budget View** focuses in on the summary information for each manager’s Org view (span of control) and Team view (direct reports only).



You are able to navigate the organizational hierarchy under a manager's span of control by clicking on the blue "+" next to a manager's name. This will show you the compensation details for each of that manager's direct reports. Continue to navigate your way through the organizational structure as needed.

Note: You may click on any subordinate manager's name to act on behalf of that manager for the purpose of reviewing and/or entering merit, bonus, and equity requests.

There are hover points (small "i" icons) and click points (large "i" icons and alert icons) to access additional information.

The search box allows you to search for specific employee names, job titles, or manager names.

If you click on the "Download Org Employee Data" link, SimplyMerit will create an Excel file containing all of the manager's direct and indirect reports. The file will be available for download on the My Account | Export page.

My Team

The **“My Team”** tab is the default login view for managers that only oversee one team of direct reports. The **My Team** screens (Merit, Bonus, and Equity) are for managers to review, modify, and submit recommendations for their direct reports. Note: depending on how your organization’s environment is configured, the salary, bonus, and equity tabs may or may not be visible.

The screenshot shows the 'My Team' interface for Louisa Cole, Finance Manager III. The 'SALARY' tab is selected. The page displays a table of employee merit data and a 'Total Allocated' summary.

Employee	Current Salary	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion	New Title	Other Percent	Other Amount	New Salary
Emilia Balistreri	€29,27/hr	6.00 %	€ 1,76	€ 31,02	0.00 %	€ 0,00	€ 31,02		0.00 %	€ 0,00	€31,02/hr
Giovanny Feeney	€88,140	3.00 %	€ 2,684	€ 88,725	0.00 %	€ 0	€ 88,725		0.00 %	€ 0	€88,725
Filberto Stroman	€31,814	3.00 %	€ 954	€ 32,768	0.00 %	€ 0	€ 32,768		0.00 %	€ 0	€32,768

Total Allocated

Merit	Promotion	Other	Lump Sum	Total
\$7,191	\$0	\$0	\$0	\$7,191

My Account

The **“My Account”** tab is the default login view for delegates that does not have any direct or indirect reports.

The screenshot shows the 'My Account' interface for Frederique Rolphon. The 'Configuration' sidebar is on the left, and the 'Your Information' section is active. The page prompts the user to adjust their personal information.

Use this screen to adjust your own personal information as the HR Administrator including changing your password.

First Name:

Last Name:

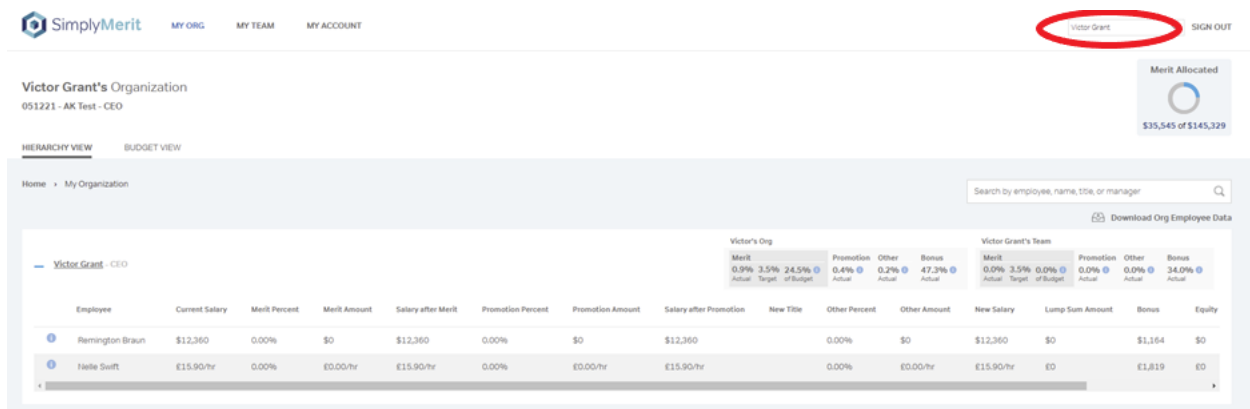
Email:

[CHANGE PASSWORD](#)

[SUMMIT](#)

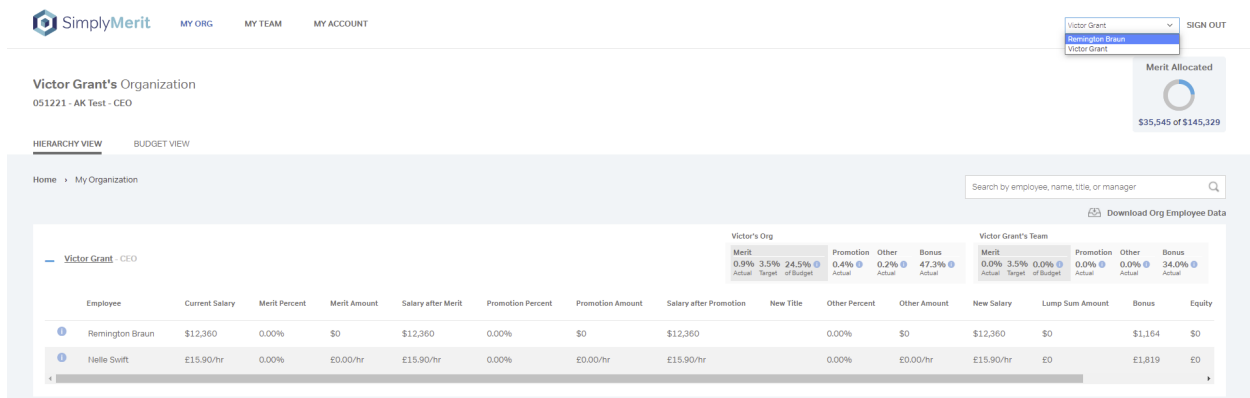
Switching Between Different Managers as a Delegate

If serving as a delegate for multiple managers, it is possible to switch between different managers by selecting the dropdown menu that is located in the top right corner of the window next to the “SIGN OUT” button.



The screenshot shows the SimplyMerit interface for Victor Grant's Organization. The user is logged in as Victor Grant, and the dropdown menu next to the "SIGN OUT" button is highlighted with a red circle. The page displays the organization's hierarchy and budget view, showing a table of employees and their compensation details.

Employee	Current Salary	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion	New Title	Other Percent	Other Amount	New Salary	Lump Sum Amount	Bonus	Equity
Remington Braun	\$12,360	0.00%	\$0	\$12,360	0.00%	\$0	\$12,360		0.00%	\$0	\$12,360	\$0	\$1,164	\$0
Helle Swift	\$15.90/hr	0.00%	\$0.00/hr	\$15.90/hr	0.00%	\$0.00/hr	\$15.90/hr		0.00%	\$0.00/hr	\$15.90/hr	\$0	\$1,819	\$0



The screenshot shows the SimplyMerit interface for Victor Grant's Organization. The user is logged in as Victor Grant, and the dropdown menu next to the "SIGN OUT" button is open, showing the option to switch to Remington Braun. The page displays the organization's hierarchy and budget view, showing a table of employees and their compensation details.

Employee	Current Salary	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion	New Title	Other Percent	Other Amount	New Salary	Lump Sum Amount	Bonus	Equity
Remington Braun	\$12,360	0.00%	\$0	\$12,360	0.00%	\$0	\$12,360		0.00%	\$0	\$12,360	\$0	\$1,164	\$0
Helle Swift	\$15.90/hr	0.00%	\$0.00/hr	\$15.90/hr	0.00%	\$0.00/hr	\$15.90/hr		0.00%	\$0.00/hr	\$15.90/hr	\$0	\$1,819	\$0

Entering Data and Managing Approval Workflows

Please refer to the **Getting Started Guide for Managers** for additional information related to entering data and managing the approval workflows within SimplyMerit. The **Getting Started Guide for Managers** can be easily accessed by navigating to the “Manager” section at <https://www.simplymerit.com/faq-managers/>.

Additional Help

The “Need Help?” link at the bottom of the screen will take you to the SimplyMerit Help panel. The SimplyMerit Help panel provides FAQs, *Getting Started Guide for Managers*, and short video clips of common tasks that are performed within SimplyMerit.

If you need additional assistance with SimplyMerit, please contact your HR Administrator by clicking the “Contact Support” link at the bottom of the screen. This will create an email to your HR Administrator.