

# Getting Started Guide for Managers



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Accept Invitation to Set Password to Gain Access to SimplyMerit for the First Time

1. An "Invitation instructions" email from <u>Support@SimplyMerit.com</u> will be received by the employees that are invited into SimplyMerit.



2. Select the "Accept invitation" link to create a password to gain access to SimplyMerit.





#### Subsequent SimplyMerit Logins Can Occur at any Time After Users Successfully Accept Their Invitations

After successfully creating a SimplyMerit password, additional logins can occur by navigating to <u>https://app.simplymerit.com</u>



## Viewing A Manager's "Span of Control" on the "My Org" tab

Direct Reports will appear in the first table on the "My Org" tab.

🚺 Si	mply <b>Merit</b>	MY ORG	MY TEAM MY ACCOUNT	NT		
Charler Austin Tes	ne Zboncak's Or t Inc - VP Finance VIEW BUDGET V	ganization				
Home > 1	My Organization					
— <u>Cha</u>	arlene Zboncak - VP Fina	nce				
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amount	Salary after Merit
0	Alice Block	\$25.00/hr	Expected	0.00%	\$0.00/hr	\$25.00/hr
0	Deonte Hermann	\$50,000	Better Than Expected	0.00%	\$0	\$50,000
0	Graciela Trantow	\$50,000	Better Than Expected	0.00%	\$0	\$50,000
		_	,			
+ /	Alice Block - Finance Dire	ector III				
+ 1	Deonte Hermann - Finano	ce Director I				
+ 9	<u>Graciela Trantow</u> - Financ	ce Director II				

On the "My Org" tab, the hierarchy views for a manager's direct reports that oversee other employees can be viewed by selecting the "+" next to an employee's name (or hidden by selecting the "-").

힝 Si	mply <b>Merit</b>	MY ORG	MY TEAM N	IY ACCOUN	т	
Charler Austin Tes	ne Zboncak's Or t Inc - VP Finance	ganization				
HIERARCH	VIEW BUDGET V	IEW				
Home >	Wy Organization					
<u>— Сћ</u>	arlene Zboncak - VP Fina	nce				
	Employee	Current Salary	Performance Rati	ng	Merit Percent	Merit Amount
0	Alice Block	\$25.00/hr	Expected		0.00%	\$0.00/hr
0	Deonte Hermann	\$50,000	Better Than Exp	ected	0.00%	\$0
0	Graciela Trantow	\$50,000	Better Than Exp	ected	0.00%	\$0
4						
•	Mice Block - Finance Dire	ector III				
+	<mark>Qeonte Hermann</mark> - Finano	e Director I				
+	Graciela Trantow - Financ	ce Director II				

#### SimplyMerit му оrg му теам му ассоилт

Cha	irlene Zboncak - VP Fina	nce			
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amount
0	Alice Block	\$25.00/hr	Expected	0.00%	\$0.00/hr
0	Deonte Hermann	\$50,000	Better Than Expected	0.00%	\$0
0	Graciela Trantow	\$50,000	Better Than Expected	0.00%	\$0
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amo
0	Employee Daniella Erdman	Current Salary \$25.00/hr	Performance Rating Better Than Expected	Merit Percent	Merit Amo \$0.00/hr
0	Employee Daniella Erdman Adela Koepp	Current Salary \$25.00/hr \$50,000	Performance Rating Better Than Expected Expected	Merit Percent 0.00% 0.00%	Merit Amo \$0.00/hr \$0
0	Employee Daniella Erdman Adela Koepp Clovis McLaughlin	Current Salary \$25.00/hr \$50,000 \$25.00/hr	Performance Rating Better Than Expected Expected Better Than Expected	Merit Percent 0.00% 0.00% 0.00%	Merit Amo \$0.00/hr \$0 \$0.00/hr
0 0 1	Employee Daniella Erdman Adela Koepp Clovis McLaughlin Daniella Erdman - Finar	Current Salary \$25.00/hr \$50,000 \$25.00/hr	Performance Rating Better Than Expected Expected Better Than Expected	Merit Percent 0.00% 0.00% 0.00%	Merit Amo \$0.00/hr \$0 \$0.00/hr

Other teams that fall within a user's "span of control" can be viewed by selecting the name of the team's manager on the "My Org" tab. (Ex: Selecting Alice's name below will take the user to Alice's team.)

The **Hierarchy View** allows you to navigate your reporting hierarchy to view summary and detailed information. It is also the workflow engine for the <u>approval process</u>.

😥 Sir	mply <b>Merit</b>	MY ORG	MY TEAM MY AC	COUNT	
Charlen Austin Tes	n <b>e Zboncak's</b> Org	ganization			
HIERARCHY	VIEW BUDGET V	IEW			
Home > M	My Organization	nce			
	anene zboncak - vr rina	nue			
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amount S
0	Alice Block	\$25.00/hr	Expected	0.00%	\$0.00/hr \$
0	Deonte Hermann	\$50,000	Better Than Expected	0.00%	\$0 \$
0	Graciela Trantow	\$50,000	Better Than Expected	0.00%	\$0 \$
- A	lice Block Pinance Direc	ctor III			
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amount
0	Daniella Erdman	\$25.00/hr	Better Than Expec	ted 0.00%	\$0.00/hr
0	Adela Koepp	\$50,000	Expected	0.00%	\$0
0	Clovis McLaughlin	\$25.00/hr	Better Than Expec	ted 0.00%	\$0.00/hr
•					

The **Budget View** focuses in on the budget summary information for each manager's Org view and Team view. Find more information about budget summaries <u>here</u>.

SimplyMerit MY ORG	MY TEAM MY ACCOUNT								SIGN OUT
Charlene Zboncak's Organization Austin Test Inc - VP Finance									Merit Allocated
HIERARCHY VIEW BUDGET VIEW									
Home + My Organization						Searc	s by employee, nam	e, title, or manager	Q
								Downlo	ad Org Employee Data
Employee	Manager		Org Rollup Metrics			Team Rollup Metrics			
Charlene Zboncak	Molly Zulauf	View Team	Charlene Zboncak's Org Merit P 0.0% 3.5% 0.0% 0 Actual Target of Butget A	tromotion Other	Bonus 44.1% 0 Actus	Charlene Zboncak's Tea Merit 0.0% 3.5% 0.0% ( Amai Teget stibulget	Promotion Othe 0.0% 0 0.0% Actual Actua	r Bonus b 0 28.5% 0 Actual	
Alice Block	Charlene Zboncak	View Team	Alice Block's Org Merit P 0.0% 3.5% 0.0% 0 Adual Sept of Bulget A	romotion Other L0% 0 0.0% 0 ctual Actual	Bonus 47,4% 0 Actual	Alice Block's Team Morit 0.0% 3.5% 0.0% 0 Actual Tarpet of Budget	Promotion Othe 0.0% 0 0.0% Actual	r Bonus 5 0 37.0% 0 Actual	
Deonte Hermann	Charlene Zboncak	View Team	Deonte Hermann's Org Merit P 0.0% 3.5% 0.0% 0 Adual Seget of Budget A	Tromotion Other 1.0% 0 0.0% 0 ctual Actual	Bonus 43.4% 0 Antiae	Deonte Hermann's Team Merit 0.0% 3.5% 0.0% 0 Astas Teget utflutget	Promotion Othe 0.0% 0.0% Actual Actua	Bonus 49,6% 0 Actual	
Graciela Trantosr	Charlene Zboncak	View Team	Graciela Trantow's Org Merit P 0.0% 3.5% 0.0% 0 Actual Seger offunget A	vomotion Other L0% 0 0.0% 0 Actual	Bonus 45.9% O Actual	Graciela Trantow's Team Merit 0.0% 3.5% 0.0% 0 Actual Target offlutget	Promotion Othe 0.0% 0.0% Actual Actual	r Bonus b () 35.2% () Actual	
Treva Elchmann	Deorte Hermann	View Team	Treva Elchmann's Org Merit P 0.0% 3.5% 0.0% () Actual Dept (Philipel A	tomotion Other 1.0% 0 0.0% 0 ctual Actual	Bonus 44.9% () Antue	Treva Eichmann's Team Merit 0.0% 3.5% 0.0% () Aduat Terget of Burget	Promotion Othe 0.0% 0 0.0% Actual Actua	r Bonus 6 0 44,9% 0 Attuel	

Utilizing Budget Summaries to Track "Actual Spend" for Span of Control and Direct Reports

Budget Summaries are available on a manager's "My Org" tab and can be used to track the spend for a manager's span of control, direct reports, and for any direct reports that serve as managers.

۵	implyMerit	MY ORG	MY TEAM MY ACCOU	NT										SIGN OUT
Charle Austin T	e <b>ne Zboncak's</b> Orç est Inc - VP Finance	ganization									Charl	laa a'a "0		SD of \$69,370
HIERARC	HY VIEW BUDGET V	1EW									Budo	ierie's L iet Sumi	mary	rts
Home >	My Organization										Search t	oy employee ham	e. title, or manager	Q
			Charler	ne's		С	harlene's						🙆 Download O	rg Employee Data
			Chanci			"5	Span of Cor	ntrol" 💻	Charlene's Org	Bromotion (Huse Bo	Charles	ne Zboncak's Tear	Bunnetice Other	Traver,
	harlene Zboncak - VP Fina		'Direct I	Repor	ts	В	udget Sumi	mary	0.0% 3.5% 0.0% ( Actual Target of Subject	0.0% 0 0.0% 0 44 Actual Actual Actual Actual	4.1% 0 0.0%	3.5% 0.0% () Target of Budget	0.0% 0 0.0% 0 Attual Actual	28.5% () Actual
	Employee	Carrent Salary	Performance Rating	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion Ne	w Title Other Percent	Other Amount	New Salary	Lump Sum Amount	Bonus
0	Alice Block	\$25.00/hr	Expected	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr	50	80
0	Deonte Hermann	\$50,000	Better Than Expected	0.00%	so	\$50,000	0.00%	\$0	\$50,000	0.00%	80	\$50,000	so	\$1,960
0	Graciela Trantow	\$50,000	Better Than Expected	0.00%	so	\$50,000	0.00%	so	\$50,000	0.00%	<sup>so</sup> Alice	e's "Dire	ct Reports"	\$2,750
			Alicols			A	Alice's				Bud	get Sum	imary 🖡	
			Alles				Span of Co	ntrol" 💻	Alice's Org	Promotion Other Bo	Alice B	lock's Team	Promotion Other	Brown
ſ	Alice Block - Finance Direc		Direct	Repo	rts	E	Budget Sum	mary	0.0% 3.5% 0.0% ( Actual Terget of Budget	0.0% 0.0% 0.47 Actual Actual Actu	1.4% O.0% Actual	3.5% 0.0% () Terget of Sucget	0.0% 0 0.0% 0 Actual Actual	37.0%  Actual
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion	New Title Other Percent	Other Amount	New Salary	Lump Sum Amouri	t Bonus
	Daniella Erdman	\$25.00/hr	Better Than Expected	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr	\$0	\$2,038
	Adela Koepp	\$50,000	Expected	0.00%	\$0	\$50,000	0.00%	\$0	\$50,000	0.00%	\$0	\$50,000	\$0	\$0
	Clovis McLaughlin	\$25.00/hr	Better Than Expected	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr	\$0	\$4,898
														•

The actual spend (left) can be tracked against the total allocated budget (right) by hovering over the blue hover icons at any time.

🗿 Si	mplyMerit	MY ORG	MY TEAM MY ACCOUNT	JNT											SIGN OUT
Charler Austin Tes	ne Zboncak's O it Inc - VP Finance	rganization													Merit Allocated
HIERARCH	VIEW BUDGET	r view													
Home >	My Organization											50	rch by employee, nam	e, 10e, or manager	Q
														Download	Org Employee Data
									Char	\$0 / \$69,370		c	harlene Zboncak's Team		
— Ch	arlene Zboncak - VP Fil	nance							Mer 0.095 3.5% Actual Terpet	0.0% 0.0%	0.0% 0	Bonus A 44.1% ( Actual	Aerit 2.0% 3.5% 0.0% () ctus Taget of Guoget	Promotion Other 0.0% 0 0.0% 0 Actual	28.5% O Actual
	Employee	Current Salary	Performance Rating	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion	New Title	Other Percent	Other Amount	t New Salary	Lump Sum Amount	Bonus
0	Alice Block	\$25.00/hr	Expected	0.00%	\$0.00/hr	\$25.00/hr	0.00%	\$0.00/hr	\$25.00/hr		0.00%	\$0.00/hr	\$25.00/hr	\$0	\$0
0	Deonte Hermann	\$50,000	Better Than Expected	0.00%	80	\$50,000	0.00%	80	\$50,000		0.00%	\$0	\$50,000	\$0	\$1,960
0	Graciela Trantow	\$50,000	Better Than Expected	0.00%	\$0	\$50,000	0.00%	\$0	\$50,000		0.00%	50	\$50,000	\$0	\$2,750

#### Entering Merit Recommendations on the "My Team" Tab

1. Merit recommendations for direct reports can be made on the My Team | "Salary" tab.

0	SimplyMerit	MYORG	MY TEAM CONF	IGURATIO	N															SIGN OUT
Charl Austin SALARY	ene Zboncak's To Test Inc - VP Finance BONUS B	eam - Salary														0.0% 50/55,220 Total Merit Alto	atad	. 544	AS DRAFT	SURMIT
Home	Charlene Zboncak Tea	am > Sələry																🖄 Dow	Status: Availing Sub Inload Team Empl	mission oyee Data
	Employee	Current Salary	Performance Rating		Merit P	lencent		Merit Amount		Salary after Merit	Promotion Percent	Premotion Amount	Salary after Promotion	New Title	Other Percent	Other Imount		ew Salary	Lump Sum Amor	unt
0	Alice Block	\$25.00/hr	ti perted	v	0	0.00	95	0 \$ 0.00	1	8 25.00	0.00 %	8 0.00	8 25.00		0.00 %	\$ 0.00		25.00/hr	8 0	
0	Deorte Hermann	\$50,000	Better Then Expected	٧	0	0.00	95	<b>o</b> \$ 0		\$ 80.000	0.00 %	\$ 0	\$ 50,000		0.00 %	\$ 0	5	50,000	\$ 0	
0	Graciala Trantow	\$50,000	Better Than Brijested	٧	0	0.00	99	<b>o</b> \$ 0		\$ 80,000	0.00 %	\$ 0	\$ 80,000		0.00 %	\$ 0	5	50,000	\$ 0	
Comm	sits															Total Allocated				+
																Merit	Promotion	Other	Lung Sun	Tetal
																4	\$0	\$0	80	80
																		SAVE	AS DRAFT	SLOWET

2. The "Total Merit Allocated" figure (below) shows a manager's total merit budget on the right-side of the figure while the actual spend on the left-side of the figure. It can be tracked live as recommendations are entered in the "Merit Percent," "Merit Amount," and "Salary After Merit" columns. Note: depending on the environment's configuration settings, the Promotion, Other, and Lump Sum allocations also might be included in the merit budget. Contact your organization's SimplyMerit HR Admin if you have any additional questions or concerns.

> 0.0% \$0 / \$5,320 Total Merit Allocated

Note: Entering a percentage value in the "Merit Percent" column will automatically calculate the amount in the "Merit Amount" and "Salary after Merit" columns. Adjusting a value in the "Merit Amount" or "Salary after Merit" column will automatically update the percentage value in the "Merit Percent" column.

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F.
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3. Select "SAVE AS DRAFT" to save recommendations or select "SUBMIT" to notify your manager that your team's recommendations are ready to be reviewed. SimplyMerit will notify your manager via email that your approval request has been submitted.

0	SimplyMerit	MY ORG	MY TEAM CONFIG	URATIO	IN														SIGN OUT
Char Austin	iene Zboncak's Test Inc - VP Finance Y BONUS	Team - Salary Equity													94.74 55,040 / 50 Total Marit	Vo ,520 Altocated		AVE AS DRAFT	SUGMIT
Home	Charlene Zboncak1	bam → Salary															₿ D	Status: Availie ownload Team I	g submission Employee Data
	Employee	Current Salary	Performance Rating		Merit	Percent		Merit Amount	Salary after Meril	Promotion Percent	Promotion Amount	Salary after Promotion	New Title	Other Percent	Other Amount		New Salary	Lamp Sum	Ancust
0	Alice Block	\$25.00/hr	Expected	×	0	2.00	95	0 \$ 0.50	\$ 25.50	0.00 %	\$ 0.00	\$ 25.50		0.00 %	\$ 0.00		\$25.50/hr	\$ 0	
0	Deonte Hermann	\$50,000	Better Then Expected	×	0	4.00	95	0 9 2.000	\$ 82,000	0.00 %	8 0	\$ 82,000		0.00 %	9 O		\$52,000	\$ 0	
0	Graciela Trantow	\$50,000	Better Than Expected	v	0	4.00	90	<b>8</b> 2,000	\$ 52,000	0.00 %	\$ 0	\$ 52,000		0.00 %	\$ C		\$52,000	8 O	
Comm	rents		Å												Total Allocated Ment \$5,040	Promotion \$0	Other \$0	Lump Sum \$0	Fotal S5,040 > SUBMATT

#### Entering Bonus Recommendations on the "My Team" tab

1. Bonus recommendations for direct reports can be made on the My Team | "Bonus" tab.

0	Simply Merit	MY ORG	MY TEAM	CONFIG	SURATION			
Cha Austin	rlene Zboncak's Te n Test Inc - VP Finance	am - Bonu	S					
SALAF		QUITY						
Home	Charlene Zboncak Tea	m → Bonus						
Alice	Block ()							
Th	Bonus Program Sal	ary Weight	Target	Proration %	Performance Facto	r Bonus Earned	Comments	
4							+	
Total t	Somus: \$0 - Ano beice							
Deon	te Hermann 🕕							
	Bonus Program	Salary	maight	Target	Proration %	Performance Factor	Bonus Earned	Comments
0	Department Bonus	\$50,000	75.00%	\$6,000	0 100.00%	0.00 %	S O	
0	Divisional Bonus	\$50,000	25.00%	4.00%	0 100,00%	0.00 %	s o	9
Total E	Bornusz \$0 · Aon onco							
Graci	ela Trantow							
	Bonus Program	Satary	weight	Target	Proration %	Performance Pactor	Bonus Earned	Comments
0	Company Bonus	\$50,000	29.41%	5.00%	0 100.00%	0.00 %	\$ 0	
0	Department Bonus	\$50,000	70.59%	\$8,000	0 100,00%	0.00 %	S 0	9
Total 8	Bonus: \$0 - Ano osce							

2. The "Total Bonus Allocated" figure (below) shows a manager's total bonus budget on the right-side of the figure while the actual spend on the left-side of the figure can be tracked live as recommendations are entered in the "Performance Factor" and "Bonus Earned" columns.



Note: Entering a percentage value in the "Performance Factor" column will automatically calculate the amount in the "Bonus Earned" column. Adjusting a value in the "Bonus Earned" column will automatically update the percentage value in the "Performance Factor" column. Note: depending on how the bonus programs are configured, some plans will only have a "Bonus Earned" or "Performance Factor" column.



3. Select "SAVE AS DRAFT" to save recommendations or select "SUBMIT" to notify your manager that your team's recommendations are ready to be reviewed. SimplyMerit will notify your manager via email that your approval request has been submitted.

💿 Sir	mplyMerit	MY ORG	MY TEAM	CONFIG	URATION			
harlen ustin Tes	e Zboncak's Te t Inc - VP Finance	am - Bonus						
ome > 0	Charlene Zboncak Ter	m → Bonus						
Alice Block	k O	ary Weight	Target	Protation %	Performance Factor	Bonus Earned	Comments	
This emp	loyee has no incentiv	15.					•	
otal Bonus	z \$0 - A00 DHO							
eonte He	rmann O							
0	ienus Program Department Bonus	Selary \$50,000	Weight 75.00%	Target \$6,000	Promation %	Performance Factor	Bonus Earned	Comments
0	Divisional Bonus	\$50,000	25.00%	4.00%	0 100.00%	100.00 %	\$ 2,000	₽,
iotal Bonus	:\$8,000 · 🛛		•					
ăraciela T	rantow							
	ionus Program	Salary	weight	Target	Proration %	Performance Pactor	Bonus Earned	Comments
0 (	Company Bonus	\$50,000	29.4199	5.00%	0 100.00%	90.00 %	\$ 2,250	ρ
0	Department Bonus	\$50,000	70.59%	\$6,000	0 100.00%	100.00 %	\$ 6.000	ρ,
atal Bonus	: \$8,250 · 🗛							

#### Entering Equity Recommendations on the "My Team" tab

1. Equity recommendations for direct reports can be made on the My Team | "Equity" tab.

0	SimplyMerit M	ORG MY TE	CONFIGURATION	i.		
Cha Aust SALA	rlene Zboncak's Team - n Test Inc - VP Finance av Bonus Equity	Equity				
om	Charlene Zboncak Team      I	iquity				
	Type of Award	Grant Date	Grant Quantity	Grant Unit Price	Value of Shares	Comments
0	Company Stock	10/29/2021	• •	\$50.00	8 0	
0	Restricted Stock Awards	08/29/2021	0	645,00	e 0	
0	Non-qualified Stock Options	11/29/2021	• •	£55.00	£ O	
0	Incentive Stock Options	08/29/2021	0	\$60.00	5 o	
						÷
Deor	Equity: \$0 CAD					
eoi	Equity: 50 CAD te Hermann O Type of Award	Grant Date	Grant Quantity	Grant Unit Price	Value of Shares	Comments
eoi 0	Equily; S0 CAD Ete Hermann    Yype of Awans Company Stock	Grant Date 10/29/2021	Grant Quantity	Grant Unit Price \$50.00	Value of Shares	Comments
0	Equipy: SD CAD Et Hermann Type of Award Company Stock Restricted Stock Awards	0rant Date 10/20/2021 09/20/2021	Grant Quantity © 0 0 0	Grant Unit Price \$60.00 €45,00	Value of Shares	Comments D D
0	te Hermann © Type of Award Company Stock Restricted Stock Awards Hen qualified Stock Options	0rant Date 10/29/2021 09/29/2021 11/29/2021	Erent Quentity © 0 © 0 © 0	Grant Unit Price \$00.00 645,00 £85.00	Value of Shares S o C o C o	Comments D D D

2. The figure that tracks the equity units (below) shows a manager's total number of units on the right-side of the figure while the actual number of units on the left-side of the figure can be tracked live as recommendations are entered in the "Grant Quantity" and "Value of Shares" columns. Note: If multiple equity programs are being used, the arrows (< and >) can be used to toggle between the different programs.



Note: Entering a value in the "Grant Quantity" column will automatically calculate the amount in the "Value of Shares" column. Adjusting a value in the "Value of Shares" column will automatically update the value in the "Grant Quantity" column. Your screen may have different fields based on how the application was configured by your HR administrator.

	SimplyMerit M	ORG MYT	EAM CONFIGURATION			
Ch: Aust	rlene Zboncak's Team - n Test Inc - VP Finance RY BONUS EQUITY	Equity				
Hom	Charlene Zboncak Team	Equity				
Alice	Block 0					
	Type of Award	Grant Date	Grant Quantity	Grant Unit Price	Value of Shares	Comments
	Company Stock	10/29/2021	0 30	\$50.00	\$ 1.800	Ø
6	Restricted Stock Awards	09/29/2021	0 20	\$45,00	e 900	Q
	Non-qualified Stock Options	11/29/2021	0 50	\$55.00	£ 2.780	Ø
	Incentive Stock Options	09/29/2021	0 90	\$60.00	\$ 5,400	Q

3. Select "SAVE AS DRAFT" to save recommendations or select "SUBMIT" to notify your manager that your team's recommendations are ready to be reviewed. SimplyMerit will notify your manager via email that your approval request has been submitted.

Simplyment	ITY ORG MY TE	M CONFIGURATION			
Charlene Zboncak's Team Austin Test Inc - VP Finance SALARY BONUS EQUIT	- Equity				
Home > Charlene Zboncak Team	Equity				
Alice Block 0					
Type of Award	Grant Date	Grant Quantity	Grant Unit Price	Value of Shares	Comments
O Company Stock	10/20/2021	0 30	\$50.00	\$ 1.500	
0 Restricted Stock Awards	09/29/2021	0 20	645,00	6 900	
	11/20/2021	0 50	\$55.00	£ 2.750	
Non-qualified Stock Options					
Non-qualified Stock Options     Incentive Stock Options	09/29/2021	0 90	\$60.00	\$ 5,400	

#### Managing the Approval Process

 The approval process begins when a manager (also referred to as "submitting manager") submits merit, bonus, or equity recommendations for their team. The submitting manager's one-up manager will become the "approving manager." An approving manager will receive an email that indicates a team recommendation is ready to be reviewed when a submitting manager submits their recommendations. Approving managers can view the submitted recommendations by selecting a "PENDING TASK," which are yellow rectangular buttons that appear on their "My Org" tab.

0	SimplyMerit	MYORG	MY TEAM MY ACCOUNT	4T													Trevion Char	npin	✓ SIGN OUT
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2. Select a "Pending Task..." button to access the manager's pending recommendation on their "My Team" tab. The recommendation's status is "Pending Approval," so the approving manager has three options: Modify, Approve, or Reject. Modifying the request allows the approving manager to directly modify the recommendations before saving the changes or choosing to approve the request. Approving the request approves the recommendations and changes the request's status from "Pending Approval" to "Approved." Rejecting the request requires an explanation, and the rejection message will be included in an email sent back to the submitting manager. Note: A manager will receive an email anytime their team's recommendation is approved, modified, or rejected.

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#### How to Reset Password and Avoid Getting Locked Out of SimplyMerit



If you forget your password, click on the link directly underneath the Password field entitled "Forgot your password? Click here" to initiate the password reset process.

SimplyMerit will lock your account after three invalid login attempts. If your account becomes locked, **wait 15 minutes** and either log in using the correct password OR trigger the password reset procedure described above. The critical step is to **wait 15 minutes** before attempting any additional login processes. SimplyMerit will automatically unlock your account after the 15-minute period.

#### Downloading Team Letters in SimplyMerit

Once a cycle is complete in SimplyMerit, your organization's administrator can generate merit, bonus, and/or equity letters. This also allows them to send notification emails to managers and download their team's letters in a convenient .zip file for easy distribution.

Below is an example of an email notification you will receive from SimplyMerit regarding your team's letters:



If you are already logged in to SimplyMerit and click the Download Letters link in the email, you will automatically begin downloading your team's merit/bonus/equity letters .zip file. If you

are not logged in when you click the Download Letters link, a browser window will open and prompt you to log in. After logging in, you can then download the letters.

You can also download the letters without using the link provided in the email notification. Logging in to <u>https://app.simplymerit.com</u> and navigating to merit, bonus, or equity My Team screens will show a new green Download Team Letters button:

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After downloading your team letters' .zip file, you will find each direct report has their own .pdf of their letter.

Your SimplyMerit administrator may have it that specific employees do not receive a letter. If this is enabled and you download your team's letters .zip file and are missing direct reports, it may be that they did not have an applicable letter generated.

#### Additional Help

 The "Need Help?" link at the bottom of the screen will take you to the SimplyMerit Help panel. 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.

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2. The SimplyMerit Help panel provides FAQs, the *Getting Started Guide for Managers*, and short video tutorials of common tasks that are performed within SimplyMerit. The video tutorials may update based on where a user is at within the application.

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