



Getting Started Guide for HR Admins



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What is included in the Getting Started Guide for HR Admins?

This Getting Started Guide is a supplemental tool available to HR Administrators (Admins) following a more comprehensive training provided by MorganHR, Inc. This guide will direct and advise HR Admins as they utilize SimplyMerit for the merit process within their company.

Getting Started with SimplyMerit

What is SimplyMerit? How does it work?

SimplyMerit is a cloud-based solution that focuses on base salary adjustments, bonus allocations, promotions, and lump sum payments. SimplyMerit provides companies the ability to manage their annual merit pay process simply and easily via a user-friendly interface. Because SimplyMerit is entirely cloud-based, there is no software to download or install in order to use SimplyMerit and secure access to the application is available anywhere on virtually any device, including mobile devices.

What are the roles and responsibilities of the HR Admin?

The HR Admin is responsible for uploading your company's employee data to SimplyMerit and for configuring the system based on your company's specific needs. Using the simple and intuitive interface allows you the flexibility to do a mass upload of all employee data, or just a few, and then go in and adjust budgets, exceptions, and other performance related variables. Once all of the configuration settings are complete, the HR Admin is then able to invite managers into the application to manage their compensation adjustment requests.

Configuration Checklist

Did you....

- Enter the Performance Rating information and recommended merit increase ranges?
- Download the employee data file template, create an extract file of your compensation data in the template format, and upload the employee data file into SimplyMerit?
- Correct any data validation errors with the uploaded data file?
- Alert your internal IT team to whitelist support@simplymerit.com?
- Update and confirm your company and personal information?
- Set the overall average Merit Allocation Percent?
- Configure any Exceptions that should be applied to the Merit Budget?
- Configure Timeline information along with Proration options?
- Set up reminders for managers?
- Configure optional Alert conditions?

- Finalize settings on the System Control page?
- Invite your managers to start their approval process?
- Edit the Adjustment Letters so they are ready to be sent to employees' managers?
- Download your company data after the entire process is complete?
- Send the Adjustment Letters to the managers?

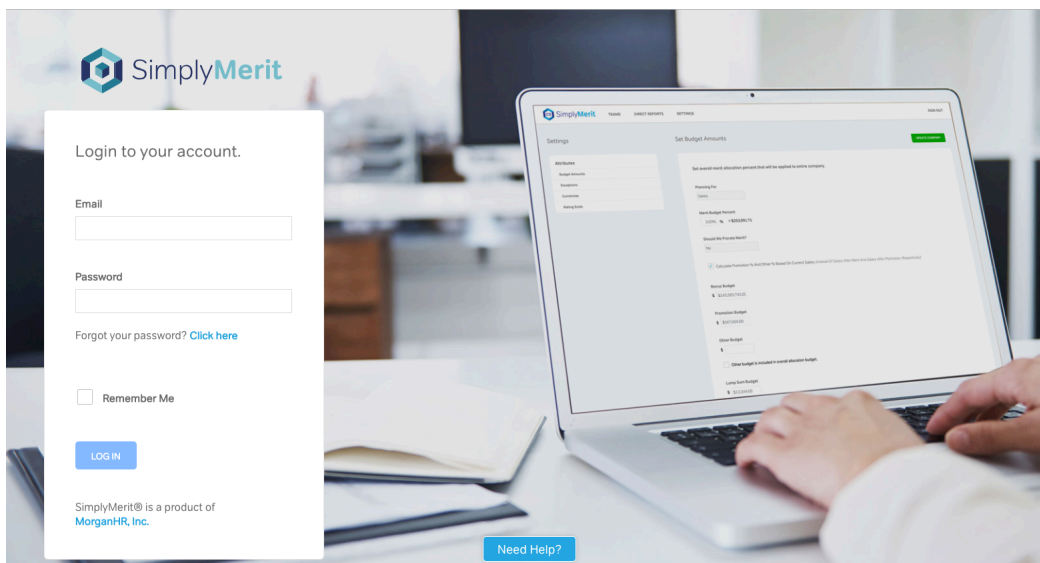
Whitelist support@simplymerit.com

SimplyMerit will send emails to your employees for a number of reasons throughout the merit and bonus cycles (invitation to connect, approval request, approval, modification, rejection, and adjustment letters). It is critical that your internal IT team is notified that a large volume of emails will come from support@simplymerit.com especially when inviting managers to connect as well as when sending out Adjustment Letters. MorganHR has made every effort to have SimplyMerit whitelisted. However, because there are so many different spam filters on the market today each with their own configuration flexibility, we ask that each customer takes the additional step of adding support@simplymerit.com or even the domain of **simplymerit.com** to their own whitelists.

Additionally, SimplyMerit sends emails from a dedicated IP address of **168.245.74.201**, which is also good to add to the whitelist.

Log In

Go to <https://app.simplymerit.com> and log in using MorganHR-provided credentials. If you have not received an email with an invitation to SimplyMerit, please contact: support@simplymerit.com.



After you have logged in, you will only see the CONFIGURATION tab located along the top of the page.

Password Resets

All users have the ability to reset their password from the Login screen. Simply click the “Forgot your password? Click here” link on the login page to trigger the password reset procedure.

Locked Accounts

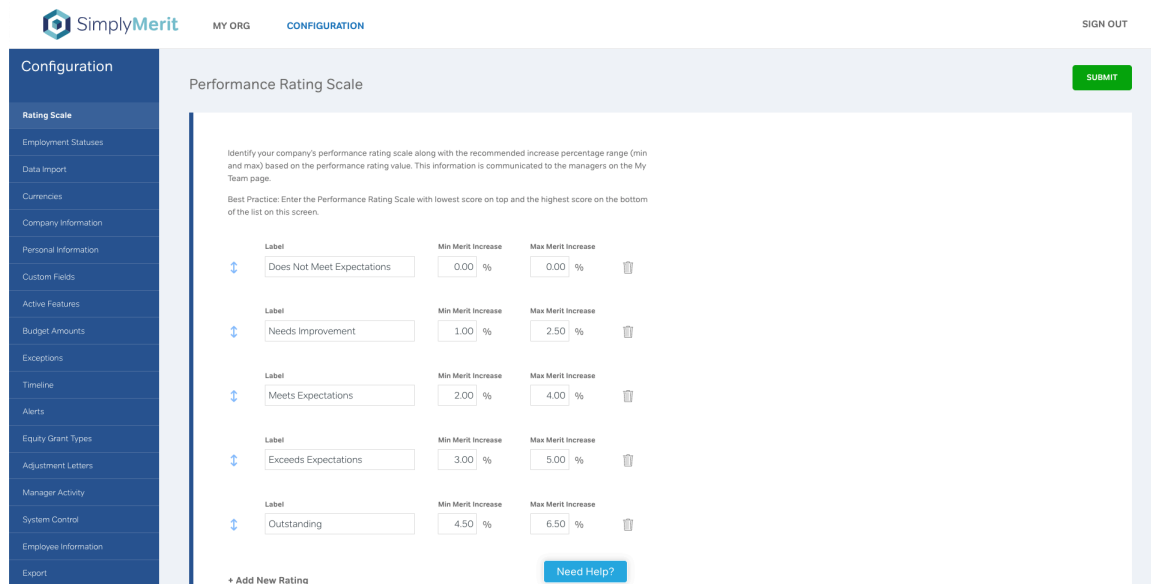
SimplyMerit will lock a user’s account after three invalid login attempts. The lock will automatically release after 15 minutes. If a user has locked his/her account, please instruct them to follow these simple steps:

1. Wait 15 minutes. **Important:** The user must wait 15 minutes before attempting to log back in using the correct password. Triggering a password reset process during the 15 minute lock-out will *restart* the 15 minute clock, so it’s best to wait the full 15 minutes before doing anything.
2. Click on the “Forgot your password? Click here” link on the login page
3. Follow the instructions to reset the password. Once reset, the user will be logged into SimplyMerit.

Configuring SimplyMerit

The Configuration section is where you will upload your company's compensation data as well as configure SimplyMerit to meet your specific organizational needs. Only HR Admins will have access to the Configuration section. As changes are made on each of the Configuration pages, don't forget to save those changes by clicking the "Submit" button. Each page is explained below.

Rating Scale



Before importing your employee data into SimplyMerit, you first need to configure the Performance Rating Scale. If your company does not provide a Performance Rating Score to your employees, then this step can be skipped. Leaving this page blank will hide the Performance Rating column on the My Org and My Team pages.

The **Rating Scale** page allows you to identify your company's Performance Rating Scale as well as to provide recommended ranges for the merit increase based on those ratings. SimplyMerit will show the recommended merit increase range to the managers after they have entered the employee's performance rating.

- Click "+Add New Rating" to add a performance rating to the list.
- Provide the performance rating description in the "Label" text box and identify the recommended minimum and maximum merit increase percentages.
- Select the "Trash" icon if you want to delete a performance rating.
- Reorder labels using drag-and-drop on the double arrows icon.
- Click "Submit" after all updates have been made.

Employee Statuses

The screenshot shows the 'Employee Statuses' configuration page in the SimplyMerit system. The page is titled 'Employee Statuses' and is part of the 'CONFIGURATION' section. The left sidebar contains a navigation menu with the following items: Rating Scale, Employment Statuses (highlighted), Data Import, Currencies, Company Information, Personal Information, Custom Fields, Active Features, Budget Amounts, Exceptions, Timeline, Alerts, Equity Grant Types, Adjustment Letters, Manager Activity, System Control, Employee Information, and Export. The main content area is titled 'Employment Statuses' and contains the following text:

CoreTeam Functionality Only

Identify the employment status options available to managers along with recommended salary adjustment ranges if applicable as well as the anticipated effective date.

Best Practice - Pay Reductions: Enter Min and Max Percentages as discount to existing salary. For example: For pay reductions of up to 20%, enter a Min Percentage of "80%" and a Max Percentage of "100%".

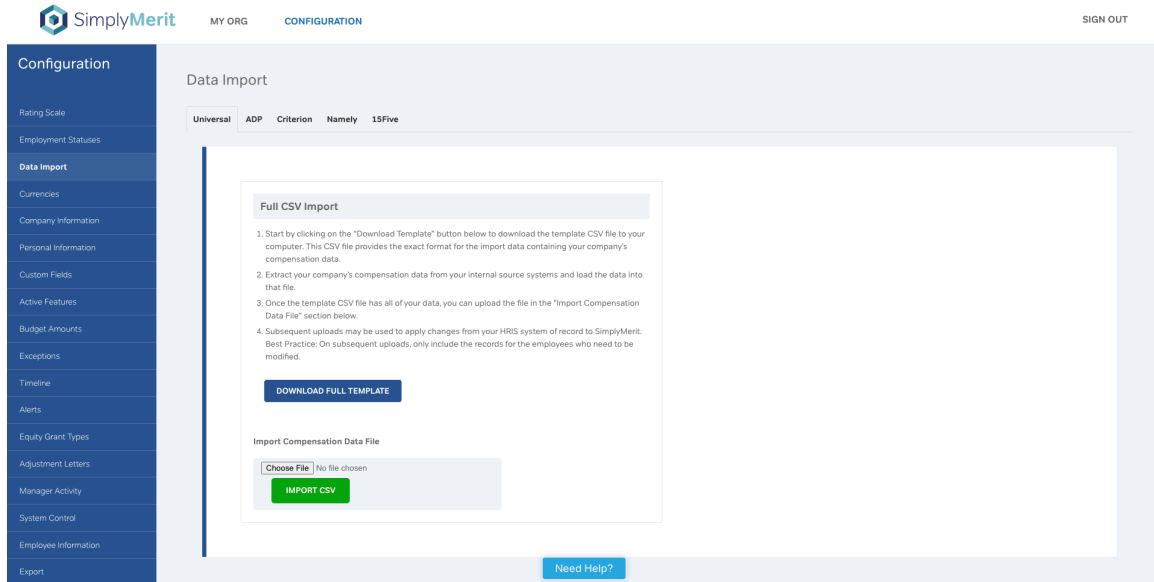
Best Practice - Min Percentage: When a manager selects one of these options, CoreTeam will automatically recalculate the employee's salary to the value in Min Percentage. This can be overridden by the manager but is intended to provide guidance based on status selection.

• Add New Employment Status

There are two green 'SUBMIT' buttons: one in the top right corner and one in the bottom right corner. A blue 'Need Help?' button is located at the bottom center of the page.

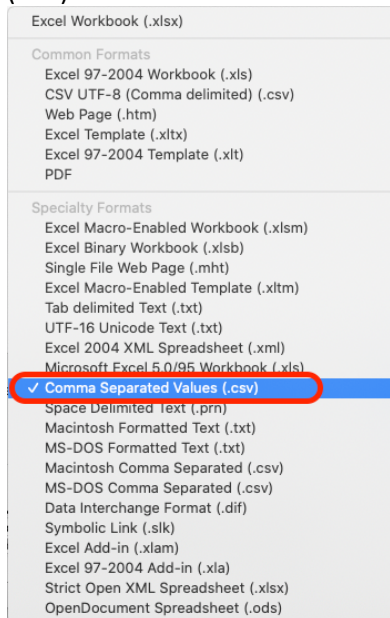
The **Employee Statuses** page is only to be used when configuring the CoreTeam version of SimplyMerit to assist with layoffs, furloughs, and pay reductions. For more information about CoreTeam, please contact us a hello@morganhr.com.

Data Import



The **Data Import** page is where you manage the data import process for your company's compensation data into SimplyMerit. SimplyMerit provides a template file that is downloaded from this page and gives you the exact data format for the import data file. Please note that SimplyMerit uses .csv (comma separated value) format for the data import files.

Important: Make sure to save your data files as "Comma Separated Values (.csv)" and **NOT** "CSV UTF-8 (Comma delimited) (.csv)."



Additional information about the data file format and fields is available on the SimplyMerit Help Page for HR Admins at <http://www.simplymerit.com/faq/> in the form of a data dictionary file.

The tabs on the Data Import page include:

1. **Universal** – This is the standard data import process that is used when importing data from virtually any HRIS other than ADP, Criterion, and Namely for which we have specific integrations built.
2. **ADP** – This tab is used when importing data directly from ADP Workforce Now.
3. **Criterion** – This tab is used when importing data from Criterion.
4. **Namely** – The import functionality on the Namely page is specific to data exported directly from Namely’s HRIS platform.
5. **15Five** – Automatically import performance data from 15Five.

Make sure that you are using the right Data Import type for your data file. More information follows for each of these import types.

Universal Data Import

Downloading the Template Data File

- Click the “[Download Template](#)” button to download a template file to your computer. This file is in .csv (comma separated values) format and is easily opened and modified in Excel. Upon examining this file, you will notice that some of the column labels are in all capital letters. The data for these columns are required for the data upload. Two additional download templates are available at <https://www.simplymerit.com/fag/> that minimize the number of fields in the file to just the essentials.
- Familiarize yourself with the data elements of the data import file by downloading the “Import File Data Dictionary” document that is accessible at the bottom of the <https://www.simplymerit.com/fag/> page.
- Create a data extract from your HR source system in the exact format contained in the template file. If you do not have data for optional data columns (indicated by lower-case column headings), you may leave those data columns blank.
- It is important to save the file in .csv format.
- There needs to be a clean hierarchy defined by the “EMP_ID” (employee ID) and “PARENT_EMP_ID” (that employee’s manager’s ID). Recursive relationships in the hierarchy are not supported by SimplyMerit and will trigger an import error.
- The “WAGES” column may contain an employee’s annual salary (exempt) or their hourly rate (non-exempt). To identify an employee’s status, enter either “exempt” or “non-exempt” in the “flsa_status” column. This column is the only way that SimplyMerit knows whether the value in the “WAGES” column is either an annual salary (“exempt”) or an hourly rate (“non-exempt”).

Uploading Data to SimplyMerit

- After you have made all appropriate updates, select the “[Choose File](#)” button and select the .csv file from your computer.
- After locating the file, select the green “[Upload](#)” button. If you are uploading more than ten records, the application will automatically switch into Background Mode to complete the upload process as a background process so that you may continue with other parts of this application. You will receive an email when the upload process has completed that indicates success or failure.

- Best Practice:** Stay on the Data Import screen and periodically hit the browser’s Refresh button to check the status of the upload. When the green “[Upload](#)” button re-appears, then the upload is complete. The parsing engine will display any errors encountered during the data import process on this page.
- If there are validation errors, your data will not be saved to SimplyMerit, and you will have the opportunity to correct those errors in the upload file. The

failure email will contain a link that enables you to view the validation errors directly within SimplyMerit.

ADP Data Import

SimplyMerit has built a data connector to automate the process of extracting data from ADP Workforce Now and importing it into SimplyMerit. This feature is only accessible when SimplyMerit is purchased through the ADP Marketplace. This creates a linkage between SimplyMerit and ADP Workforce Now, which enables the two ADP Import buttons. Please note that currently ADP does not provide a mechanism for partner applications to access your bonus information, thus the SimplyMerit data connector is only able to access your employee merit information.

Import ADP Employee Data

The “Import ADP” button in this section will automatically import your ADP employee data directly into SimplyMerit. As with the .csv import option defined above, this process can be repeated as needed to refresh the data.

Extract ADP Employee Data to CSV

The more popular option is to use the “Extract ADP” button. This button will extract your ADP Workforce Now employee and merit data to a .csv file in the format that SimplyMerit expects. This action gives you the opportunity to intercept the data before it is loaded into SimplyMerit. When you are ready to load the .csv file, follow the steps described above about loaded data from .csv files.

Uploading ADP Data to SimplyMerit

- After you have made any updates to your employee data in the .csv file, select the “Choose File” button on the Universal tab and select the .csv file from your computer.
- After locating the file, select the green “Upload” button. If you are uploading more than ten records, the application will automatically switch into Background Mode to complete the upload process as a background process so that you may continue with other parts of this application. You will receive an email when the upload process has completed that indicates success or failure.

Best Practice: Stay on the Data Import screen and periodically hit the browser’s Refresh button to check the status of the upload. When the green “Upload” button re-appears, then the upload is complete. The parsing engine will display any errors encountered during the data import on this page.

- If there are validation errors, your data will not be saved to SimplyMerit, and you will have the opportunity to correct those errors in the upload file. The

failure email will contain a link that enables you to view the validation errors directly within SimplyMerit.

Criterion Data Import

Downloading the Template Data File

- Click the “Download Template” button to download a template file to your computer. This file is in .csv (comma separated values) format and is easily opened and modified in Excel. Upon examining this file, you will notice that some of the column labels are in all capital letters. The data for these columns are required for the data upload. Two additional download templates are available at <https://www.simplymerit.com/faq/> that minimize the number of fields in the file to just the essentials.
- Familiarize yourself with the data elements of the data import file by downloading the “Import File Data Dictionary” document that is accessible at the bottom of the <https://www.simplymerit.com/faq/> page.
- Criterion has built integration into SimplyMerit in the form of a standard process that creates an extract file from Criterion in the format that SimplyMerit expects. Please contact Criterion for assistance with generating this .csv file of your employee data.

Uploading Data to SimplyMerit

- After you have made any desired updates to your employee data file, select the “Choose File” button and select the .csv file from your computer.
- After locating the file, select the green “Upload” button. If you are uploading more than ten records, the application will automatically switch into Background Mode to complete the upload process as a background process so that you may continue with other parts of this application. You will receive an email when the upload process has completed that indicates success or failure.

Best Practice: Stay on the Data Import screen and periodically hit the browser’s Refresh button to check the status of the upload. When the green “Upload” button re-appears, then the upload is complete. The parsing engine will display any errors encountered during the data import on this page.

- If there are validation errors, your data will not be saved to SimplyMerit, and you will have the opportunity to correct those errors in the upload file. The failure email will contain a link that enables you to view the validation errors directly within SimplyMerit.

Namely Data Import

The data import process for Namely is documented in detail in a separate document entitled “SimplyMerit Import Export Guide – Namely” that can be found on our documentation site <https://www.simplymerit.com/faq>.

15Five Data Import

The 15Five data import option allows you to leverage the API connection between SimplyMerit and 15Five. Your aggregate rating scores and your company value scores are imported from the review cycle of your choice.

Please contact SimplyMerit Support at support@simplymerit.com to configure the API connection. Once configured, you may use the 15Five Data Import screen whenever you need to import ratings.

In order to import the rating scores from 15Five, you will need to provide the 15Five Cycle ID for the review cycle that you need to access. Follow these steps within 15Five in order to find the Cycle ID:

1. In 15Five, select “Best-Self Review” on the left-hand menu
2. In the list of Review Cycles, click on the “Review cycle name” for the review that you intend to use in SimplyMerit
3. The Cycle ID is in the URL for the page of the specific review cycle. For instance, the URL for the review that was selected in #2 above is <https://my.15five.com/reviews/cycles/1266583/> making the Cycle ID = 1266583

Enter the Cycle ID in the SimplyMerit data import screen for 15Five, choose how to match employees, and click “Sync Now.”

Incentives CSV Import – Applies to All Data Import Tabs

The incentives data may be imported separately from the merit data using the “Incentives CSV Import” section. Click on the “[Download Incentives Template](#)” button to download a template file for the incentives file. Note that the “EMP_ID” field is used to map the incentives with the employee merit data previously loaded. Please note, any subsequent updates to bonus programs that are already imported into SimplyMerit requires that the “INCENTIVE_PROGRAM_X_NAME” column is included on the import file before the appropriate column(s) that need to be modified for the bonus program to be successfully updated. For example, if the target type for “Company Bonus,” needs to be changed from percentage to nominal, then INCENTIVE_PROGRAM_1_NAME and INCENTIVE_PROGRAM_1_TARGET_TYPE would be required on the import file (the example assumes INCENTIVE_PROGRAM_1_NAME was used for the “Company Bonus” program).

Also note that there are two options with loading incentives data:

1. One data row per employee with multiple incentive programs for each employee listed on the single row. This inherently has a limit of five incentive programs per employee.
2. Multiple data rows per employee with each incentive program listed in the “incentive_program_1_...” fields. This option allows you to load a virtually unlimited number of incentive programs per employee. Please note that when exporting your final data at the end of the process, the main “Final Employee Data” export process will export the updated salary data and a limit of five incentive program records. There is a separate export process to export just the incentive data items when more than five incentive programs exist per employee.

Equity CSV Import – Applies to All Data Import Tabs

The equity data may be imported separately from the merit data using the “Equity CSV Import” section. Click on the “[Download Equity Template](#)” button to download a template file for the equity file. Note that the “EMP_ID” field is used to map the equity grants with the employee merit data previously loaded.

Also note that there are two options with loading equity data:

1. One data row per employee with multiple equity programs for each employee listed on the single row. This inherently has a limit of five equity programs per employee.
2. Multiple data rows per employee with each equity program listed in the “grant_1_...” fields. This option allows you to load a virtually unlimited number of equity programs per employee. Please note that when exporting your final data at the end of the process, the main “Final Employee Data” export process will export the updated salary data and a limit of five equity program records. There is a separate export process to export just the equity data items when more than five equity programs exist per employee.

Delegates CSV Import

SimplyMerit allows a delegate (typically a Human Resources Business Partner) to be assigned to act on behalf of one or more managers. Managers can only have one assigned delegate, but delegates can be assigned to multiple managers. The sections below discuss the two different ways that delegates can be assigned to managers, and how the delegate(s) can be invited into SimplyMerit.

Two Ways to Assign a Delegate to a Manager

Utilize Employee Information tab within SimplyMerit

SimplyMerit MY ORG CONFIGURATION SIGN OUT

Configuration

Employee Information

Rating Scale
Employment Statuses
Data Import
Currencies
Company Information
Personal Information
Active Features
Budget Amounts
Exceptions
Timeline
Alerts
Equity Grant Types
Adjustment Letters
Manager Activity
System Control
Employee Information
Export

UNDO SEARCH Search by employee ID, name, or email

Employee	Title	Employee ID	Edit Employee
Donnell Anderson	HR Analyst III	64	Edit Employee
Unique Bailey	HR Analyst I	56	Edit Employee
Caleigh Bailey	HR Analyst III	67	Edit Employee
Emilia Ballstren	Finance Analyst I	28	Edit Employee
Vita Bernier	Finance Analyst II	35	Edit Employee
Abdullah Blick	Finance Analyst II	14	Edit Employee
Rolando Bogan	HR Analyst III	79	Edit Employee
Harry Bogan	Finance Analyst III	42	Edit Employee
Haleigh Boyle	Finance Analyst III	27	Edit Employee
Remington Braun	VP Finance	3	Edit Employee
Marian Brekke	HR Analyst II	78	Edit Employee
Lizeth Bruen	Finance Manager I	7	Edit Employee
Joseph Carter	Finance Director II	5	Edit Employee
Aidan Cartwright	HR Manager II	72	Edit Employee
Louisa Cole	Finance Manager III	21	Edit Employee

After employees have been imported into SimplyMerit, a delegate can be assigned to a manager.

Navigate to Configuration | Employee Information | Select “Edit Employee” for the manager that needs to have a delegate assigned.

Enter the delegate's EMP_ID in the field titled "Delegate EMP ID" and click the "SUBMIT" button to successfully assign a delegate to a manager.

The screenshot shows the 'Configuration' page in the SimplyMerit system. The left sidebar contains a navigation menu with categories like 'Rating Scale', 'Employment Statuses', 'Data Import', 'Currencies', 'Company Information', 'Personal Information', 'Active Features', 'Budget Amounts', 'Exceptions', 'Timeline', 'Alerts', 'Equity Grant Types', 'Adjustment Letters', 'Manager Activity', 'System Control', and 'Employee Information'. The 'Employee Information' section is active, displaying various fields for configuration. The 'Delegate EMP ID' field is highlighted with a red box and the number 3. The 'SUBMIT' button is also highlighted with a red box and the number 4.

Job Title	Job Level	Job Class
HR Analyst III	manager	Administrative
Department	Division	EEO Category
HR	Corporate	
Is Admin?	Enable Invitation	Hire Date
No	No	01/26/2018
Rehire Date	Years At Company	Full-Time/Part-Time
Rehire Date	2	Fulltime
Weekly Standard Hours	FLSA Status	Wages
40.0	Exempt	12,239.28
Salary Structure	Pay Frequency	Pay Per Period
sbared	Biweekly	2,000.00
Market Min	Market Mid	Market Max
9,964.335296	12,566.55417	15,168.77304
Custom ID 1	Custom ID 2	Custom ID 3
Custom ID 4	Lock Out Of App?	Delegate EMP ID
	No	

Note: a delegate can be unassigned by deleting the delegate's EMP_ID in the "Delegate EMP ID" section. Then, select the "SUBMIT" button to successfully save the changes to unassign the delegate from the manager.

Create a Delegates CSV Import File

Navigate to Configuration | Data Import | “Delegates CSV Import” section | Select “Download Delegates Template” button.

The screenshot shows the SimplyMerit Configuration page. On the left is a navigation menu with 'Data Import' highlighted in red and a large red '1' next to it. The main content area has two sections. The top section is 'Import Equity Grants Data File' with a 'DOWNLOAD EQUITY TEMPLATE' button. The bottom section is 'Delegates CSV Import' with a 'DOWNLOAD DELEGATES TEMPLATE' button highlighted in red and a large red '2' next to it.

On the Delegates CSV Template:

EMP_ID	delegate_id
Manager's EMP_ID	Delegate's EMP_ID

- Enter the manager’s EMP_ID in the “EMP_ID” column.
- Enter the delegate’s EMP_ID in the “delegate_id” column in the same row to assign a delegate to a manager.
 - Reminder: Managers can only have one assigned delegate, but delegates can be assigned to multiple managers.
- Save the delegates template as a CSV file (without UTF encoding)
- Navigate to Configuration | Data Import | Universal | Delegates CSV Import section to import the CSV file

Inviting Delegates into SimplyMerit

Once delegates have been assigned, they will need to be invited into SimplyMerit. To invite your delegates, navigate to Configuration | System Control | Select the “Send Delegate Invites” button to send bulk invitations to SimplyMerit Delegates.

The screenshot displays the SimplyMerit user interface. On the left is a dark blue navigation sidebar with the following menu items: Configuration, Rating Scale, Employment Statuses, Data Import, Currencies, Company Information, Personal Information, Active Features, Budget Amounts, Exceptions, Timeline, Alerts, Equity Grant Types, Adjustment Letters, Manager Activity, System Control, Employee Information, and Export. The 'System Control' item is circled in red and has a large red number '1' next to it. The main content area is titled 'CONFIGURATION' and contains three sections: 1. 'Toggle to CoreTeam' with a description and a checkbox labeled 'coreTeam'. 2. 'Send Admin Invites' with a description and a red button labeled 'SEND ADMIN INVITES'. 3. 'Send Manager Invites' with a description and a grey button labeled 'SEND MANAGER INVITES'. Below these is the 'Send Delegates Invites' section with a description and a red button labeled 'SEND DELEGATE INVITES', which is circled in red and has a large red number '2' next to it. A 'Need Help?' link is located at the bottom right of the main content area.

Note: a user will not receive multiple invitations if they have previously accepted an invitation to establish a password to gain access to SimplyMerit.

The Delegate User Experience

After delegates sign into SimplyMerit, there are three different screens that the delegates might encounter. 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.

Delegates Can Switch Between Different Managers

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.

SimplyMerit MY ORG MY TEAM MY ACCOUNT Victor Grant SIGN OUT

Victor Grant's Organization
051221 - AK Test - CEO

HIERARCHY VIEW BUDGET VIEW

Home > My Organization

Search by employee, name, title, or manager

Download Org Employee Data

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

SimplyMerit MY ORG MY TEAM MY ACCOUNT Victor Grant SIGN OUT

Victor Grant's Organization
051221 - AK Test - CEO

HIERARCHY VIEW BUDGET VIEW

Home > My Organization

Search by employee, name, title, or manager

Download Org Employee Data

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

Subsequent Data Uploads

SimplyMerit allows you to load all of your data at one time, to load data in multiple passes, and to refresh your data from your HRIS system of record at any point even mid-cycle while managers are in the application. Fields marked as “Required” in the data dictionary must contain data on the initial import, but only the EMP_ID field is required on subsequent uploads.

How Does SimplyMerit Process Subsequent Data Uploads

SimplyMerit provides a great deal of flexibility when uploading your company’s compensation data file. You can upload all of your employee information or only the part of it that needs changing. SimplyMerit will add data records that it finds in the data file, and it will update existing data with any changes it finds in the records contained in the data file. This gives you the ability to:

- Load all or part of your employee data records at a time
- Add employee data records in small batches. New employees will be added and existing employees will be updated with any new or changed data in the file.
- Correct specific data fields on employee data records and upload just those records. All changes will be applied to the existing employee data in SimplyMerit.

Important: If you need to modify a few employees’ information (change data values, move employees to a new manager, add new employees, etc.), navigate to the Employee Information tab to edit individual employees or simply create a data import file that contains **just the modified employees’ records** and **only the data fields** that need to be modified. The [Employee Information](#) section has additional information on editing employees within SimplyMerit.

Important: Extra care should be taken to not overwrite modifications made by managers since many of the editable fields on the screen can be preloaded in the data import file. For instance, you can preload the Merit % value from the data file. If a manager has made changes to the Merit % value for an employee, and you perform a subsequent upload for that employee where the “merit_percent” field in the data file contains a value, it will override the change made by the manager.

Subsequent data imports need only contain the “EMP_ID” and whichever fields need to be modified. For instance, if you need to change the salary for employee # 100, simply import a data file that contains two columns (“EMP_ID” and “WAGES”) and two rows (column headers on row 1 and the employee information on row 2) similar to:

EMP_ID	WAGES
100	45000

Email addresses may be changed at any time as well. Simply import a file with EMP_ID and EMAIL columns with the new email address. If that employee is a manager, then you will need to resend their invitation from the Configuration | Manager Activity screen so that they can login using their new email address.

SimplyMerit will process just the modifications without having to read through all of the static data.

Best Practice: If an employee is not to receive an increase under any circumstances, you can set their WAGES to zero (0) in the data import file to prevent the manager from assigning an increase.

Best Practice: To remove a terminated employee from SimplyMerit, simply import the corresponding employee record with a date in the “term_date” field (“Departure Date” for Namely import files), and the employee will be deleted from SimplyMerit and budgets will be updated accordingly.

Avoid Updating Columns on Subsequent Uploads that can Override Managers’ Decisions

If certain values were preloaded or managers have actively made changes inside SimplyMerit, avoid uploading the columns listed below on subsequent imports so managers’ previous decisions are not overwritten.

Column Name	Description
merit_percent	Preload each employees' merit percentage value for managers
promotion_percent	Preload each employees' promotion percentage value for managers
other_percent	Preload each employees' other percentage value for managers
lump_sum_amount	Preload each employees' lump sum amount percentage value for managers
comment	Salary adjustment comments
incentive_program_X_comment	Incentive program comments
incentive_program_X_performance_factor	Bonus attainment percentage
grant_X_comment	Equity program comments
grant_X_quantity	Quantity of shares as shown on the Equity tab under Grant Quantity

Decimal Precision

SimplyMerit calculates and stores all amounts and percentages to eight (8) decimal places. For display purposes, most amounts are rounded to the whole number, and percentages are rounded to two (2) decimal places. For the adjustment letters, amounts are shown to two (2) decimal places, and percentages are also shown to two (2) decimal places.

Preloading Data Elements

There are a number of fields typically populated by managers that allow you to preload data during the data import process as described below.

Preloading Employee Exceptions

On the data import file, the column entitled “merit_percent_exception” allows you to preload employee-level exceptions on the data import process. Enter the merit percent that you wish to preload into SimplyMerit for the affected employees, and SimplyMerit will create an Employee-level Exception for each such employee as seen on the Configuration | Exceptions page.

Preloading Merit Percentages for All Employees

On the data import file, the column entitled “merit_percent” allows you to preload the employee merit percentages across your employee population. The main difference between “merit_percent” and “merit_percent_exception” is that the “merit_percent” values will be shown on the My Org and My Team pages to the manager. This is an effective way to preload recommended Merit Percent increases for the managers and then have them simply adjust the numbers if they desire.

Preloading Comments

The “comment” fields for merit and bonuses can be preloaded with comments to help communicate and guide managers.

Preloading Bonus Amounts and Bonus Performance Factors

On the data import file, the columns in the incentive_program groups for “performance_factor” and “amount_earned” can be preloaded with values that are then shown to the managers. This is helpful if large group bonus performance factors are already established, or if recommendations are to be communicated to managers regarding bonus amounts.

Date Conversion in Excel

SimplyMerit expects dates to be in the YYYYMMDD format. If your data contains dates in any other format, Excel provides a useful function to convert them:

=TEXT(A2,"YYYYMMDD")

If cell A2 contains "01/03/2020" as the date, the above function would return "20200103" as the result.

Incentive Proration Data

SimplyMerit is able to understand and apply a wide variety of proration logic based on your data. The following four dates allow you to apply automatic proration logic down to the day-level:

- Incentive_program_1_start_date
- Incentive_program_1_end_date
- Incentive_program_1_cycle_start_date
- Incentive_program_1_cycle_end_date

Important Note! If you are providing any of these four dates, you MUST provide ALL FOUR dates. More information about each date variable can be found in the SimplyMerit Data Dictionary available for download from <https://www.simplymerit.com/faq/>.

Blank Lines in Comments

On the import file, there are several comment fields (salary, bonus, equity sections) that can be loaded with the additional information that managers require. It's often easier to read if these comments are formatted across multiple lines. This can be populated in Excel in one of two ways:

1. Typed in - On a PC, press Alt + Enter to start a new line. On a Mac, it's Control + Option + Enter.
2. Formula - Use "CHAR(10)" as in the following formula:
=B2&CHAR(10)&C2&CHAR(10)&D2

Note that the fields must have "Wrap Text" turned on.

Currencies

SimplyMerit MY ORG MY TEAM CONFIGURATION SIGN OUT

Configuration

- Rating Scale
- Data Import
- Currencies**
- Company Information
- Personal Information
- Active Features
- Budget Amounts
- Exceptions
- Timeline
- Alerts
- Equity Grant Types
- Adjustment Letters
- Manager Activity
- System Control
- Export

Currencies SUBMIT

Identify the currency exchange rates for your organization on this page by entering them below. [See all supported currencies](#)

Base Currency Code
usd

Exchange Rates

0.92	eur	= 1 usd
0.78	gbp	= 1 usd

SUBMIT

[Need Help?](#)

The currency values are extracted from the data import file and displayed here on this screen. First, set your Base Currency Code that is used for all aggregations within SimplyMerit. For the remaining currencies under “Exchange Rates,” set the exchange rate that you wish applied to currencies when converting from their local currency to the Base Currency.

All employees should be imported with their WAGES set in their local currency and the appropriate currency code. SimplyMerit will show their individual information in their local currency. Anytime that employee data is aggregated, it will be converted to the Base Currency and displayed as such.

Company Information

SimplyMerit MY ORG CONFIGURATION SIGN OUT

Configuration Company Information SUBMIT

Please provide the company address information that will be used in the employees' compensation adjustment letters that will be generated at the end of this merit pay cycle.

Name

Company Address

Company Address (Line 2)

City

State Province

Postal Code

Phone

[Need Help?](#)

Enter company name and address information, check for accuracy, and then click the **“Submit”** button. This information will be available to be used in the employee's compensation adjustment letters that will be generated at the end of SimplyMerit cycle.

Personal Information

SimplyMerit MY ORG CONFIGURATION SIGN OUT

Configuration

Rating Scale

Employment Statuses

Data Import

Currencies

Company Information

Personal Information

Custom Fields

Active Features

Budget Amounts

Exceptions

Timeline

Alerts

Equity Grant Types

Adjustment Letters

Manager Activity

System Control

Employee Information

Export

Your Information

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

First Name
Neil

Last Name
Morgan

Email
nmorgan@morganhr.com

CHANGE PASSWORD

SUBMIT

SUBMIT

Need Help?

As the primary HR Admin, this page allows you to modify your personal information as well as to change your password. If you would like to add additional HR Admins, you may identify them in the data file by entering “yes” under the “IS_ADMIN” column on their data records. To change the initial password provided to you by MorganHR, Inc. on this page:

- Click “Change Password” at the bottom of the **Personal Information** page.
- Enter your current password
- Enter a new password and confirm your new password
- Click “Submit”

Custom Fields

The screenshot shows the 'Custom Fields' configuration page in the SimplyMerit application. The page title is 'Custom Fields' and it includes a 'SUBMIT' button in the top right corner. The main content area is titled 'Employee Custom Fields' and contains a list of six custom fields. Each field is represented by a 'Name' label, a text input field containing the field name, a trash icon, and a sort icon. The fields listed are: 'medical_co_amount', 'medical_ee_amount', 'dental_co_amount', 'dental_ee_amount', 'vacation', and 'sick_days'. A 'Need Help?' button is located at the bottom right of the list. The left sidebar shows the 'Configuration' menu with 'Custom Fields' selected.

The **Custom Fields** page allows you to identify unlimited custom data fields throughout the SimplyMerit application. These custom fields are able to be:

- Imported into SimplyMerit – Simply add a column to your import file that has the same header column name as the custom field
- Displayed to Managers – These data fields then can be added to the My Org and My Team screens using the Active Features configuration screen
- Added to Adjustment Letters – Each of these custom fields can be added to the Adjustment Letters
- Exported from SimplyMerit – All of the custom fields are included in the exports from SimplyMerit

This allows you to import a wide variety of data fields into your compensation cycles.

A couple of things to consider:

- Name your custom field using all **lowercase** with **underscores** between words
- Use the exact same field name on your import file. The order of columns does not matter... just the name of the column.

Active Features

The screenshot shows the 'Active Features' configuration page in the SimplyMerit system. The left sidebar contains a navigation menu with options like 'Rating Scale', 'Employment Statuses', 'Data Import', 'Currencies', 'Company Information', 'Personal Information', 'Custom Fields', 'Active Features', 'Budget Amounts', 'Exceptions', 'Timeline', 'Alerts', 'Equity Grant Types', 'Adjustment Letters', 'Manager Activity', 'System Control', 'Employee Information', and 'Export'. The main content area is titled 'Active Features' and includes a 'SUBMIT' button in the top right corner. There are two main sections: 'Final Approval' and 'Merit Columns'. The 'Final Approval' section asks if the user wants to enable the feature, shows a checkbox for 'Final Approval Feature', and lists 'First Approver' and 'Second Approver' with dropdown menus and their respective approval statuses. The 'Merit Columns' section asks if the user wants to view merit columns and includes a checked checkbox for 'Show Merit Columns'. A preview table shows columns for 'Merit Percent', 'Merit Amount', and 'Salary after Merit' with corresponding values.

Merit Percent	Merit Amount	Salary after Merit
4.00 %	£ 1.71	£ 44.38

This page lets you customize SimplyMerit to meet your business needs. You can show, hide, or rename many of the fields on the My Org and My Team screens. Additionally, you can add additional fields to the screens in the “Display Fields” section at the bottom of this screen.

For instance, you may rename “Other” for “Other Percent” and “Other Amount” fields if there is a different use-case for these fields. Many customers will use the “Other” fields to separate out Market adjustments from Merit adjustments, in which case they will rename these fields to “Market Percent” and “Market Amount.”

Settings that pertain to either the My Org or the My Team screens are labeled as such.

A few sections of note:

The “Final Approval” section allows you to assign one or two final approvers; typically, these are CEO and CFO/CHRO. When all configured approvers (one or two) have submitted their approvals, SimplyMerit will generate a Final Data export in the “Final Approval – Data Export” section of Config | Export | Universal tab. The final approval can be reset if needed directly on this page.

The “Bonus Salary Value – My Team” setting deserves a little further explanation. Percentage-based bonuses are, by default, calculated against the employee’s Current Salary. You can override this by importing a different salary for such bonuses (such as YTD earnings). The “Salary” on the My Team | Bonus page shows the employee’s Current Salary. If you would like “Salary” to show the other salary that’s used for the bonus calculation, check this checkbox.

Towards the bottom of the Active Features page are the “**Display Fields**” sections. This allows you to add any number of additional data fields to the Salary, Bonus, and/or Equity screens as you need. There are custom fields that you may also use to import any additional data not already present in the list. You set the column heading and can use the up/down arrows to rearrange these fields as you need.

Finally, the “**Manager Download Fields**” sections allow you to determine which fields are available on the Excel downloads that the managers can initiate from My Org and My Team screens. Virtually all of the data fields including custom fields are available for inclusion in the manager download files.

Budget Amounts

The screenshot shows the 'Budget Amounts' configuration page in the SimplyMerit system. The page is divided into a left-hand navigation menu and a main content area. The navigation menu includes options like 'Rating Scale', 'Employment Statuses', 'Data Import', 'Currencies', 'Company Information', 'Personal Information', 'Custom Fields', 'Active Features', 'Budget Amounts' (which is highlighted), 'Exceptions', 'Timeline', 'Alerts', 'Equity Grant Types', 'Adjustment Letters', 'Manager Activity', 'System Control', 'Employee Information', and 'Export'. The main content area is titled 'Budget Overview' and displays five budget categories: Merit Budget (\$60,368), Promotion Budget (\$0), Other Budget (\$0), Lump Sum Budget (\$0), and Bonus Budget (\$0). Below this is the 'Set Budget Amounts' section, which includes a 'What Are We Processing?' section with checkboxes for Salary, Bonus, and Equity. The 'Merit Allocation Percent' is set to 4.00%, resulting in a Merit Budget of \$60,368. The 'Salary Base' section has a checkbox for 'Calculate Promotion % And Other % Based On Current Salary' which is checked. A 'Need Help?' button is visible at the bottom right of the configuration area.

The **Budget Amounts** page allows you to make configuration choices that impact the budgets tracked by SimplyMerit. The most important element on this page is the “Merit Allocation Percent Field.”

The header at the top of the page allows you to see your current budgets. Only the Merit Budget is calculated based on the configuration settings on this page, the **Exceptions** page, and **Timeline** page. If your company tracks budgets for Promotion, Other, and Lump Sum adjustments, then you may enter those values on this page. These budget values will be available for actual vs. budget variance reporting in a future release.

Each time you click the “Submit” button, the Merit Budget will be recalculated in the background and may take a few moments before it reflected in the “Merit Budget” figure at the top of this page.

Configuring the Budget Amounts

- “What Are We Processing” – This section allows you to control which tabs appear on the My Team pages for managers: Salary, Bonus, and/or Equity.
- “Merit Allocation Percent” – Set the overall merit percent increase that applies across your company for this merit cycle. Exceptions may be noted on the **Exceptions** page as described below.
- “Salary Base” – If the Promotion and Other adjustment values should be calculated based on current salary instead of stacking the adjustments, then check the “Salary Base” checkbox.
- Budgets – Enter budget amounts, if applicable, for Promotion, Other, and Lump Sum Budgets. If the checkboxes associated with Other and Lump Sum are

checked, then any monies applied by managers to these categories should deduct from that manager's Merit Budget.

- If your company only supports "Subjective" bonus types, check the "Using Only Subjective Bonuses..." checkbox under "Bonus Budget." This will ensure that the total graphic at the top of the Bonus page displays the bonus roll-ups correctly.
- Click "Submit" when done.

****Note:** See the **Exceptions** page to identify any exceptions to the overall average merit increase percent. When you update the **Exceptions** page, it will also update the "Merit Budget" amount.

Exceptions

The screenshot shows the 'Exceptions' page in the SimplyMerit system. The top navigation bar includes the SimplyMerit logo, 'MY ORG', 'CONFIGURATION', and 'SIGN OUT'. A left sidebar lists various configuration options, with 'Exceptions' highlighted. The main content area is titled 'Budget Overview' and displays five budget categories: Merit Budget (\$60,368), Promotion Budget (\$0), Other Budget (\$0), Lump Sum Budget (\$0), and Bonus Budget (\$0). Below this is the 'Allocation Exceptions' section, which includes a 'SUBMIT' button and a text box explaining that exceptions are used to fine-tune merit budget amounts based on country, division, department, budget team, and employee level. There are three sections for adding exceptions: 'Country Exceptions', 'Division Exceptions', and 'Department Exceptions', each with a '+ Add' button. A 'Need Help?' button is located at the bottom right of the 'Department Exceptions' section.

The **Exceptions** page allows you to set group or individual budget exception amounts based on various criteria (country, division, department, and employee.)

To Enter Exceptions

- Click “+ Add” associated with the appropriate grouping and select your option from the Selection Menu. The values presented to you are taken directly from the import data file.
- Update the “Merit Percent” value.
- Continue this process until all exceptions have been indicated.
- Once all exceptions have been entered, click the “Submit” button.
- If you need to delete an exception, click on the “Trash” icon next to that exception.

The order of precedence is from the smallest focus to the broadest focus. So, Employee Exceptions take precedence over Budget Team Exceptions, which take precedence over Department Exceptions, and so on with “Merit Allocation Percent” on the Budget Amounts page being the broadest focus.

Timeline

The screenshot shows the 'Timeline' configuration page in the SimplyMerit system. The page is titled 'Configuration' and includes a sidebar with various settings like 'Rating Scale', 'Employment Statuses', and 'Budget Amounts'. The main content area is divided into two sections: 'Budget Overview' and 'Timeline'. The 'Budget Overview' section displays five budget categories: Merit Budget (\$60,368), Promotion Budget (\$0), Other Budget (\$0), Lump Sum Budget (\$0), and Bonus Budget (\$0). The 'Timeline' section contains two sub-sections: 'Target Completion Dates' and 'Effective Dates'. The 'Target Completion Dates' section includes three date input fields for Salary (09/30/2022), Bonus (09/30/2022), and Equity (10/07/2022). The 'Effective Dates' section includes two date input fields for Salary and Bonus, and a 'Need Help?' button. A green 'SUBMIT' button is located in the top right corner of the configuration area.

The **Timeline** page is used to identify various dates that are significant in the merit pay cycle as well as how proration rules should be managed. Additionally, multiple application-generated reminder dates may be set to allow SimplyMerit to automatically remind managers who have not yet completed their tasks about the upcoming deadline.

Selecting Target Completion Dates

- Identify the dates for both Salary and Bonus processes by which managers should have all merit and bonus requests entered AND approved.

Selecting Effective Dates

- Identify the effective dates for both the Salary and Bonus allocations.

Important Note! Namely customers – Make sure to set the Effective Date because this is fed through to the output file from SimplyMerit for sending updates back to Namely.

Merit Proration

- The two checkboxes allow you to configure the application to automatically prorate merit increases by Hire Date (or Rehire Date if present) and by Date of Last Increase if they occur within the defined Merit Cycle period.

- Identify the start and end dates for the Merit Cycle. This is useful when processing a stub year instead of a normal 365-day year.
- More information about how SimplyMerit processes Proration calculations is available in the Resources section of <http://www.simplymerit.com/faq/>.

Standard Merit Cycle Prorations

Enter the start of your merit cycle in Merit Cycle Start Date and the end of your merit cycle in Merit Cycle End Date. Anyone hired or promoted mid-cycle will have their merit increase prorated to the date of hire or date of last increase based on which proration checkboxes were selected.

Alternatively – Forcing a Cut-off Date

SimplyMerit allows for a Cut-off Date to be set on the Configuration | Timeline screen. When used, no budget will be allocated to employees hired after the cut-off date, and a special notation will be added to the employee information pop-up screen. However, SimplyMerit does not force a cut-off and will allow managers to request a merit increase for those employees.

How do you force a cut-off date of Q4 if you're not using the "Date of Hire" proration option?

Simply set:

- Merit Cycle Start Date = "09/30/2020" (adjust for year and fiscal timing)
- Merit Cycle End Date = "09/30/2020" (adjust for year and fiscal timing)
- Check the "Date of Hire" proration option
- Set the Cut-off Date (below Bonus Proration) to "09/30/2020"

Bonus Proration

- The checkbox allows you to configure the application to automatically prorate bonuses by Hire Date (or Rehire Date if present). Date values associated with bonus calculations are contained in the data import file and include start and end dates for the employee's participation in the particular bonus plan as well as the bonus plan's start and end date.
- More information about how SimplyMerit processes Proration calculations is available in the Resources section of <http://www.simplymerit.com/faq/>.

Cutoff Date

Employees who were hired after the Cutoff Date, if one is set, are not eligible for an increase. By setting the Cutoff Date, SimplyMerit will automatically create Employee Exceptions on the Configuration | Exceptions screen of 0% for each employee who was hired after the Cutoff Date.

The calculated Merit Budget will reflect a 0% merit adjustment for all employees hired after the Cutoff Date. You may override specific employees by changing or removing an individual Employee Exception on the Configuration | Exceptions screen.

Managers may still request an increase for these employees, but such increase is not part of the budget, will deduct from the budget available for other direct reports, and will need approval by the approving manager.

Refer to the “Alternatively – Forcing a Cut-off Date” section above for details on how to force a cut-off date.

You may leverage the “Merit Percent Increase Outside Recommendation” Alert to trigger an alert if a manager gives anything other than a 0% merit adjustment for these employees. All alerts are configured on the Configuration | Alert page.

Setting Reminders

On the **Timeline** page, HR Admins have the ability to schedule email reminders to be automatically sent out to managers who have not completed AND approved bonus and salary adjustments for their team.

- Click “+Add” to add a reminder entry.
- Enter the reminder date by clicking on the “Reminder Date” field and choosing the date from the calendar pop-up.
- From the drop down menu, select what category you would like to have the reminder sent: Salary, Bonus, Equity, or all three.
- Use the “Trash” icon to delete reminder entries.
- Continue adding reminder entries using “+Add”.
- Click “Submit” after all updates have been made.

All managers that have been invited into the system, and who have not yet submitted their merit, bonus, or equity recommendations will receive a reminder email. Reminders are only sent out relative to submitting recommendations. SimplyMerit does not send reminders out to approving managers who have pending approvals.

Alerts


The screenshot shows the Alerts configuration page in the SimplyMerit system. The page has a dark blue sidebar on the left with a menu of configuration options: Rating Scale, Employment Statuses, Data Import, Currencies, Company Information, Personal Information, Custom Fields, Active Features, Budget Amounts, Exceptions, Timeline, Alerts (highlighted), Equity Grant Types, Adjustment Letters, Manager Activity, System Control, Employee Information, and Export. The main content area is titled 'Alerts' and contains a 'SUBMIT' button in the top right corner. Below the title, there is a paragraph explaining that alerts are used to identify anomalous situations or outliers in compensation data. The 'Salary Alert Configurations' section contains three rows of configuration options:

- Salary After Adjustments Below Market Min
Label: Salary after Merit, Promotion, and Other adjustments still below market minimum
- Salary After Adjustments Above Market Max
Label: Salary after Merit, Promotion, and Other adjustments above market max
- Merit Percent Increase Outside Recommendation
Label: Merit increase percentage is outside of the recommended range (based on Performance Rating)

At the bottom of the configuration section, there is a 'Tolerance' field and a 'Need Help?' button.

SimplyMerit will scan the compensation data for outliers and anomalies as defined by the numerous configurable alert conditions. Checking the corresponding checkbox will activate the Alert. Additionally, the alert message can be customized with your specific message.

Several Alerts also allow for additional configuration options such as adding an additional tolerance before the alert condition is triggered.

When an Alert condition is triggered, the following alert icon will be displayed next to the Employee or Manager name: . Alert conditions are tested when the manager clicks the “Save As Draft” and the “Submit” buttons.

The Alert icon is visible on the My Org, My Team | Salary, and My Team | Bonus screens. The Alert icon is available for the requesting manager, any manager up the organizational structure, and the HR Administrator(s). If you click on the icon, the customizable alert message(s) will be displayed in a pop-up window.

Equity Grant Types

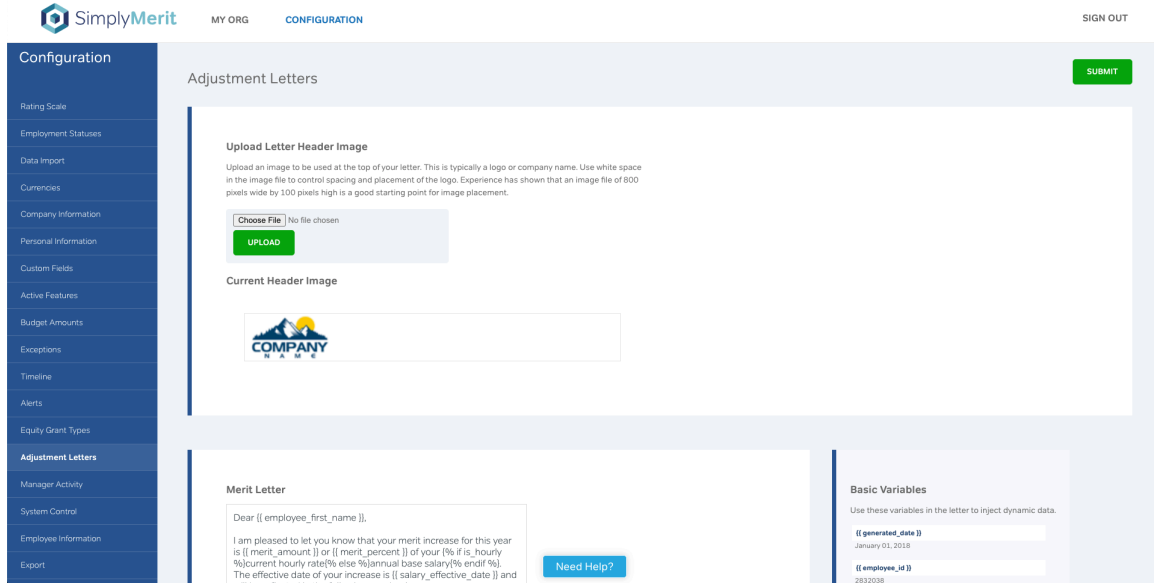
The screenshot displays the 'Equity Grant Types' configuration interface. On the left is a dark blue sidebar with a list of menu items: Rating Scale, Employment Statuses, Data Import, Currencies, Company Information, Personal Information, Custom Fields, Active Features, Budget Amounts, Exceptions, Timeline, Alerts, Equity Grant Types (highlighted), Adjustment Letters, Manager Activity, System Control, Employee Information, and Export. The main content area is titled 'Grant Types' and features a green 'SUBMIT' button in the top right. It is divided into two sections: 'Options' and 'RSU'. Each section shows progress bars for 'Allocated' and 'Approved' grants, both currently at 0%. Below these are input fields for Name, Unit Price, Currency Code, Pool, and Date. The 'Options' section has 'Options' in the Name field, '0.00' in Unit Price, 'usd' in Currency Code, '500000' in Pool, and '10/28/2022' in Date. The 'RSU' section has blank fields for Name, Unit Price, and Currency Code, and a 'Need Help?' button next to the Currency Code field.

The **Equity Grant Types** page helps you to manage the overall pool for each Grant. If the date and unit price are known, enter them here to provide those values to managers on the Equity tab of the My Team screens.

If those values are unknown, you may leave them blank as well as hide the unit price and value columns via the Configuration | Active Features page.

Additionally, administrators have visibility throughout the process into the pool allocations (“Allocated”) that have not yet been approved as well as the “Approved” pool allocations.

Adjustment Letters



The **Adjustment Letters** page provides the ability to build customized merit adjustment and bonus payout letters for distribution to your managers.

Upload Letter Header Image

A header image may be uploaded that contains the image that will appear across the top of each letter. Typically, this is the company logo. If you would like to include additional information, you may do so by adding it to the image file that is uploaded.

Important Note! The image that you upload will automatically be adjusted to fit the width of the page and is centered on the page. So, if you upload a file that contains just your company logo, it will be stretched to the entire width of the printed page. A best practice is to create an image that is roughly 800 pixels wide and places your logo exactly where you would like it to appear on the printed page (typically either left or right justified). Supported image file formats include .jpg and .png.

Merit Letter, Bonus Letter, and Equity Letter

The “Merit Letter,” “Bonus Letter,” and “Equity Letter” editor is built into SimplyMerit. This supports text, variables, and Boolean logic, which are listed on the right side of the screen. A sample is provided to illustrate how to build the letters and how to use the variables to embed actual data values into the letters.

You are free to use these two letters in any way that you want. You may combine merit, bonus, and/or equity information on one letter, or you may separate them as implied on the screen.

Click on the “Save” button to save your changes to the letter(s).

Click on the “Generate Test PDF” to generate a sample page of how the letter will appear. The sample page will be downloaded to your computer in PDF format. Note that this Test PDF is generated using a sample employee record that may or may not resemble your specific structures.

Best Practice: When testing your letters, use the Configuration | Export page feature to generate “All Merit Letters,” “All Bonus Letters,” or “All Equity Letters” as appropriate. This will generate all of your letters using all of your employee data records. Once the letters have been generated, you may download them in a Zip file format by clicking “Save to Computer.” This process does NOT send the letters to the managers; rather it simply builds all of the letters and makes them available to administrators to download.

Basic Formatting: SimplyMerit’s PDF generator does support the following formatting tags:

- Bold – ` `
 - Example: You are receiving a promotion to `{{ promotion_title }}`
- Underline - `<u> </u>`
 - Example: You are receiving a promotion to `<u>{{ promotion_title }}</u>`
- Italics - `<i> </i>`
 - Example: You are receiving a promotion to `<i>{{ promotion_title }}</i>`
- Strikethrough - ` `
- Subscript - ``
- Superscript - ``
- Combining bold and underline - `<u> </u>`
 - Example: You are receiving a promotion to `<u>{{ promotion_title }}</u>`
- Font Size - ` `
- Font Name - ` `
- Color - `<color rgb='FF00FF'> </color>`
- External Link - `<link href='https://www.simplymerit.com'> </link>`
 - Example using additional tags for standard web page link:
Click `<u><link href='https://www.simplymerit.com'><color rgb='0000FF'>this link</color></link></u>` to view the SimplyMerit website
- Centering / Indenting Text – This is not natively supported but can be accomplished with a little out of the box thinking. In the example below, we are changing the font color to white, entering a number of “X” characters to facilitate the desired spacing, and ending the white font color:
 - `<color rgb='FFFFFF'>XXXXXXXXXXXXXXXXXXXX</color>`

NOTE: Be sure that the single quotes are not formatted (usually show tilted if formatted). So, they should be ' and not ´. The easiest thing to do is to use a basic text editor and not Word for writing the code.

Advanced Formatting: SimplyMerit is using a template language that was originally created by Shopify and is used by many modern web application including Salesforce, Zendesk, etc. As

such, there is a robust markup language available beyond what is displayed on the SimplyMerit Adjustment Letters screen. For a complete list of the markup language options, please visit <https://shopify.github.io/liquid/>.

Best Practice: To help with managing blank lines when using the hyphens with conditional logic, it is recommended that you also use “
” to indicate exactly where line breaks are to occur. For example, consider the following section of an adjustment letter with conditional logic. The “
” forces the extra blank line and gives you full control over spacing while avoiding additional blank lines due to the conditional logic:

...will appear in your paycheck received on February 5, 2021.

{%- if adj_pct > 0 -%}

Per your agreement with {{ company_name }}, you will be paid at {{ adj_pct }}% due to your reduced schedule.

{%- endif -%}

We appreciate your commitment to {{ company_name }} and all of your hard work.

Example 1: The following markup can be used to round the {{ new_salary }} value to the nearest whole dollar. Note that {{ new_salary }} is actually a text field with numbers and characters (“\$” and “,”). This makes it a bit more challenging to parse the values that we need, but the code below accomplishes the rounding and returning the value with the necessary formatting re-applied.

```
{%- assign raw_amt_split = new_salary | remove: "$" | remove: "," | round | split: "." -%}
{% assign raw_amt_integral = raw_amt_split[0] -%}
{% assign raw_amt_fractional = raw_amt_split[1] | append: "00" | truncate: 2, "" -%}
{% assign raw_size = raw_amt_integral | strip | size -%}
{% assign raw_hundreds = raw_amt_integral | slice: -3,3 -%}

{% if raw_size < 4 -%}
  {% assign formatted_integral = raw_amt_integral -%}
{% elsif raw_size == 4 -%}
  {% assign raw_thousands = raw_amt_integral | truncate: 1, "" -%}
  {% assign formatted_integral = raw_thousands | lstrip | append: "," | append:
raw_hundreds -%}
{% elsif raw_size == 5 -%}
  {% assign raw_thousands = raw_amt_integral | truncate: 2, "" -%}
  {% assign formatted_integral = raw_thousands | lstrip | append: "," | append:
raw_hundreds -%}
{% elsif raw_size == 6 -%}
  {% assign raw_thousands = raw_amt_integral | truncate: 3, "" -%}
  {% assign formatted_integral = raw_thousands | lstrip | append: "," | append:
raw_hundreds -%}
{% elsif raw_size == 7 -%}
  {% assign raw_thousands = raw_amt_integral | slice: -6,3 -%}
  {% assign raw_millions = raw_amt_integral | truncate: 1, "" -%}
  {% assign formatted_integral = raw_millions | lstrip | append: "," | append: raw_thousands |
append: "," | append: raw_hundreds -%}
{% elsif raw_size == 8 -%}
  {% assign raw_thousands = raw_amt_integral | slice: -6,3 -%}
  {% assign raw_millions = raw_amt_integral | truncate: 2, "" -%}
  {% assign formatted_integral = raw_millions | lstrip | append: "," | append: raw_thousands |
append: "," | append: raw_hundreds -%}
{% else -%}
  {% assign raw_thousands = raw_amt_integral | slice: -6,3 -%}
  {% assign raw_millions = raw_amt_integral | truncate: 3, "" -%}
  {% assign formatted_integral = raw_millions | lstrip | append: "," | append: raw_thousands |
append: "," | append: raw_hundreds -%}
{% endif -%}

{% assign new_salary_rounded = formatted_integral | append: "." | append:
raw_amt_fractional | prepend: "$" -%}
```

Ex: If {{ bonus_amount }} equals “\$79,505.33”,

Then the code above would return `{{ final_bonus }}` equal to “\$79,505”.

Note: Repeat the above code block to apply the same logic to other amounts like `current_salary` or `merit_amount`.

Example 2: The following example can be used if calculations are required to be made against any formatted amount field. Similar to Example 1, this code will strip the formatting in order to perform the required calculation. It will then parse the calculation result back into a formatted amount inclusive of decimal places.

```
{%- assign new_salary_raw = new_salary | remove: "$" | remove: "," -%}
{% assign actual_annual_amt_raw = new_salary_raw | times: 0.90909091 -%}

{% assign raw_amt_split = actual_annual_amt_raw | split: "." -%}
{% assign raw_amt_integral = raw_amt_split[0] -%}
{% assign raw_amt_fractional = raw_amt_split[1] | append: "00" | truncate: 2, "" -%}
{% assign raw_size = raw_amt_integral | strip | size -%}
{% assign raw_hundreds = raw_amt_integral | slice: -3,3 -%}

{% if raw_size < 4 -%}
  {% assign formatted_integral = raw_amt_integral -%}
{% elsif raw_size == 4 -%}
  {% assign raw_thousands = raw_amt_integral | truncate: 1, "" -%}
  {% assign formatted_integral = raw_thousands | lstrip | append: "," | append:
raw_hundreds -%}
{% elsif raw_size == 5 -%}
  {% assign raw_thousands = raw_amt_integral | truncate: 2, "" -%}
  {% assign formatted_integral = raw_thousands | lstrip | append: "," | append:
raw_hundreds -%}
{% elsif raw_size == 6 -%}
  {% assign raw_thousands = raw_amt_integral | truncate: 3, "" -%}
  {% assign formatted_integral = raw_thousands | lstrip | append: "," | append:
raw_hundreds -%}
{% elsif raw_size == 7 -%}
  {% assign raw_thousands = raw_amt_integral | slice: -6,3 -%}
  {% assign raw_millions = raw_amt_integral | truncate: 1, "" -%}
  {% assign formatted_integral = raw_millions | lstrip | append: "," | append: raw_thousands |
append: "," | append: raw_hundreds -%}
{% elsif raw_size == 8 -%}
  {% assign raw_thousands = raw_amt_integral | slice: -6,3 -%}
  {% assign raw_millions = raw_amt_integral | truncate: 2, "" -%}
  {% assign formatted_integral = raw_millions | lstrip | append: "," | append: raw_thousands |
append: "," | append: raw_hundreds -%}
{% else -%}
  {% assign raw_thousands = raw_amt_integral | slice: -6,3 -%}
  {% assign raw_millions = raw_amt_integral | truncate: 3, "" -%}
  {% assign formatted_integral = raw_millions | lstrip | append: "," | append: raw_thousands |
append: "," | append: raw_hundreds -%}
{% endif -%}

{% assign actual_annual_amt = formatted_integral | append: "." | append: raw_amt_fractional
| prepend: "$" -%}
```

Example 3: IF.. Then.. Else logic can be applied to any data variable available in SimplyMerit. If you want special text to be included in the adjustment letters for only employees of a certain department, you would use something like this:

```
{%- if department_name == "Sales" -%}
```

Please note that your On Target Variable (OTV) under the Sales Variable Compensation Plan will remain unchanged for the remainder of the 2018 calendar year. Please refer to the plan document for details.

```
{%- endif -%}
```

Example 4: Rounding percentages is much easier and can be accomplished in a single statement that rounds merit_percent to a single decimal place instead of the standard two decimals:

```
{%- assign merit_percent_rounded = merit_percent | remove: "%" | round: 1 | append:
"%" -%}
```

Downloading Team Adjustment Letters as a Manager

SimplyMerit Support Emails Notify Managers that Adjustment Letters are Ready

Note that only managers with “enable_invitation” set to “yes” will receive the email notifications.

The image shows an email notification from SimplyMerit Support and a screenshot of a manager's dashboard. The email, from support@simplymerit.com, informs Claudine that her team's Merit Adjustment Letters are complete and provides a link to download them. The dashboard, for James Lovell's Team (NASA - 132 - Apollo 13 Commander), shows a 126.9% merit allocation (\$20,131 / \$15,867) and a prominent green button labeled "DOWNLOAD TEAM LETTERS". Below this, a table lists the merit details for six team members.

James Lovell's Team - Salary
NASA - 132 - Apollo 13 Commander

126.9%
\$20,131 / \$15,867
Total Merit Allocated

DOWNLOAD TEAM LETTERS

SALARY | BONUS | EQUITY

Home > My Team > Salary

Status: Approved

Download Team Employee Data

Employee	Current Salary	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion
Buzz Aldrin	\$80,500	4.00%	\$3,220	\$83,720	4.00%	\$3,349	\$87,069
Neil Armstrong	\$80,500	4.00%	\$3,220	\$83,720	4.00%	\$3,349	\$87,069
Scott Carpenter	\$24.00/hr	4.00%	\$0.96/hr	\$24.96/hr	4.00%	\$1.00/hr	\$25.96/hr
Gordon Cooper	\$24.45/hr	4.00%	\$0.98/hr	\$25.43/hr	4.00%	\$1.02/hr	\$26.45/hr
Charles Duke	\$80,500	4.00%	\$3,220	\$83,720	4.00%	\$3,349	\$87,069
John Glenn	\$80,500	4.00%	\$3,220	\$83,720	4.00%	\$3,349	\$87,069

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Manager Activity

The screenshot displays the 'Manager Activity' page in the SimplyMerit system. At the top, there is a navigation bar with the SimplyMerit logo, 'MY ORG', 'MY TEAM', 'CONFIGURATION', and 'SIGN OUT'. Below the navigation bar, there is a sidebar on the left with a 'Configuration' menu. The main content area is titled 'Manager Activity' and features three green buttons: 'APPROVE ALL - SALARY', 'APPROVE ALL - BONUS', and 'APPROVE ALL - EQUITY'. Below these buttons is a table with the following columns: Manager, Invitation Sent, Invitation Status, Last Signed In, Merit Status, Bonus Status, and Equity Status. The table contains 12 rows of data, each representing a manager. At the bottom of the page, there is a 'Need Help?' button and a 'Contact Support' link.

Manager	Invitation Sent	Invitation Status	Last Signed In	Merit Status	Bonus Status	Equity Status
Abel Davis	-	Send Invite	-	Approved	Approved	Awaiting Submission
Adrianna Kling	-	Send Invite	-	Approved	Approved	Awaiting Submission
Aiden Lindgren	-	Send Invite	-	Approved	Approved	Awaiting Submission
Alanna Emmerich	-	Send Invite	-	Approved	Approved	Awaiting Submission
Araceli Erdman	-	Send Invite	-	Approved	Approved	Awaiting Submission
Benton Hodkiewicz	-	Send Invite	-	Approved	Approved	Awaiting Submission
Bernard Gleason	-	Send Invite	-	Approved	Approved	Awaiting Submission
Billy Hilpert	-	Send Invite	-	Approved	Approved	Awaiting Submission
Bria Rogahn	-	Send Invite	-	Approved	Approved	Awaiting Submission
Chanelle Haley	-	Send Invite	-	Approved	Approved	Awaiting Submission
Chloe Kozey	-	Send Invite	-	Approved	Approved	Awaiting Submission
Clarabelle Wisozk	-	Send Invite	-	Approved	Approved	Awaiting Submission

This page will provide you with a real-time view of each manager’s activity within SimplyMerit including:

- When the email invitation to connect to SimplyMerit was sent
- The ability to individually send or resend the invitations. Note that there is also a field on the data import file called “enable_invitation” that will allow you to specify who should and should not receive an invitation to connect to SimplyMerit. If a manager loses or does not receive an invitation, you may resend the invitation from this page.
- When the manager last signed into SimplyMerit
- The status of the manager’s Merit submission
- The status of the manager’s Bonus submission

Note that each column is sortable by clicking on the column header. A second click on the header will reverse the sort order for the column.

Important Note! You may use the “Send Invite” link to invite managers into SimplyMerit before the system is “Finalized” and the bulk invitations are sent out. This is useful if you want to provide your CEO, CFO, or other leaders with access to SimplyMerit without making them additional Administrators.

If you do invite managers using this method and then later “Finalize” the company and “Send Manager Invites,” only the managers who have not been previously invited will receive the invitations. This avoids duplicate invitations and overlapping security credentials.

The Approve All buttons will allow you to flip all submissions into an “Approved” state. This is needed to be done before Adjustment Letters are sent to managers as only those with their changes approved will be able to access the letters.

System Control

The screenshot shows the 'Configuration' page in the SimplyMerit system. The left sidebar lists various configuration options, with 'System Control' highlighted. The main content area is titled 'Finalize, Invite, and Lock' and contains three sections:

- Finalize Company:** A section with the heading 'Finalize Company' and a sub-heading 'Are you ready to finalize the company and begin the allocation process? Once the company is finalized, users can start to receive emails from SimplyMerit.' Below this is an unchecked checkbox labeled 'Finalize Company'.
- Toggle to CoreTeam:** A section with the heading 'Toggle to CoreTeam' and a sub-heading 'CoreTeam is a Workforce Management application built right into SimplyMerit designed to help companies engage managers in the difficult task of layoffs, furloughs, pay reductions, and schedule reductions. Use this setting to switch the application between SimplyMerit and CoreTeam functionality.' Below this is an unchecked checkbox labeled 'CoreTeam'.
- Send Admin Invites:** A section with the heading 'Send Admin Invites' and a sub-heading 'To invite your admins into SimplyMerit, click the "Send Admin Invites" button below.' To the right of this text is a blue button labeled 'Need Help?'.

In the top right corner of the main content area, there is a green button labeled 'SUBMIT'.

Finalize

During the testing phase of setting up your company data and configuration options, the “Finalize Company” checkbox should be UNchecked. While unchecked, activities in the system that would normally trigger emails out to managers are redirected to send those emails to the primary HR Admin.

Once you have completed your company settings, click the “Finalize Company” checkbox and click the “Submit” button. SimplyMerit then sets your entire configuration to a “finalized” status, and all future emails sent by the application will be to their intended recipients.

When you click “Finalize,” two things happen:

1. The “Send Manager Invites” button is enabled
2. All SimplyMerit-generated emails, with the two exceptions noted below, that should go to managers actually are sent to managers (as compared to when it is UNfinalized, emails are redirected to the primary HR Admin’s account)
 - a. Admins can send one-off invitations to managers from Config | Manager Activity screen even with “Finalize” unchecked
 - b. Managers who have previously logged into SimplyMerit can still process password resets with “Finalize” unchecked as long as their “enable_invitation” is set to “yes.”

Tip: If you prevent SimplyMerit from emailing notifications to managers, you may simply UNcheck the “Finalize” checkbox and click the “Submit” button. Managers will continue to have access to SimplyMerit, but emails sent by SimplyMerit will be rerouted to the primary HR Admin. Alternatively, you may also change the manager’s “enable_invitation” setting to “no” to prevent SimplyMerit from communicating with specific managers.

Important Note: Managers who have not previously logged in will not be able to request a password reset while this is UNchecked. They will receive a “You are not authorized to access the application at this time” error message.

Send Admin Invites

If you specify multiple HR Administrators on your data import file, use this button to separately invite them to connect to SimplyMerit while you are still testing the application and before you invite the managers to the application. Each HR Administrator will receive an email with a unique link to SimplyMerit that will allow the HR Administrator to create his/her credentials. SimplyMerit will never send credentials via email.

Should an HR Administrator forget his/her password, please follow these steps to trigger a password reset:

1. From another HR Administrator’s account, navigate to the Configuration | System Control screen, check the “Finalize” checkbox, and click the “Submit” button. Please note that any emails related to the approval workflow process will now be directed to the managers while the application is “Finalized.”
2. The HR Administrator who needs to reset their password should go to <https://app.simplymerit.com> and click the “Forgot your password? Click here” link. Follow the normal process from here.
3. Once the password has been reset, navigate to the Configuration | System Control screen, uncheck the “Finalize” checkbox, and click the “Submit” button. This will place the application back in test mode, and all emails related to the approval workflow process will now be redirected to the primary HR Administrator’s account.

Send Manager Invites

When you are ready to roll this application out to the managers, simply click the “Send Manager Invites” button. Each people manager with “enable_invitation” set to “yes” will receive an email with a unique link to SimplyMerit that will allow the manager to create his/her credentials. SimplyMerit will never send credentials via email.

Note that there is a column in the data import file called “enable_invitation” that can be used to control which managers receive (“yes” or blank values) or do not receive (“no” value) invitations to connect to SimplyMerit.

You can set all employees’ “enable_invitation” value to “yes” if you want all managers to access the application. SimplyMerit is smart enough to only send invitations to people managers.

Additionally, if you forget to set a manager's "enable_invitation" to "yes" and have already sent the invitation through SimplyMerit, you have three options:

- Configuration | Manager Activity – You may send one-off invitations directly from this screen.
- Reimport a Modified Data File – You may flip the "enable_invitation" value to "yes" on the data import file and reload it. Once the data has been updated, you may click the "Send Manager Invites" button. Only managers who have not previously been sent an invitation will receive the invitation on the subsequent push of this button.
- Configuration | Employee Information – You may change the "enable_invitation" setting on this screen as well. As with option 2 above, you will still need to click the "Send Manager Invites" button again.

Lock-Out Managers

When you are finished with SimplyMerit and wish to prevent managers from logging into the application, check the "Lock-Out Managers" checkbox and click the "Submit" button. This will lock the application for managers only... Admins will still have access to SimplyMerit.

You may lock and unlock SimplyMerit for managers at any time and for any reason.

Please note that this is a hard, immediate lock action forcing managers out of the application and may result in lost changes.

Lock SimplyMerit for Changes

This options places SimplyMerit into view-only mode for managers and delegates, but Admins will continue to have full capabilities in SimplyMerit.

This is most often used at the end of the cycle when all approvals are in, and managers are downloading their adjustment letters.

Reset Employee Data

The Reset Employee Data feature will COMPLETELY **ERASE** ALL OF YOUR EMPLOYEE DATA AND MANAGER USER ACCOUNTS. Do not use this button without first fully understanding its impact!

When you click the "Reset Employee Data" button, SimplyMerit will erase all employee-related data including compensation information, merit adjustments, and bonus allocations. All configuration data that is not at the employee-level will remain intact.

Please note that any Employee Exceptions on the Configuration | Exceptions screen will be deleted along with the employee records. It is recommended that the employee exceptions be rendered in the data import file using the "merit_percent_exception" data field.

Prior to deleting all employee data, SimplyMerit will trigger a Universal data export. That export file will be available on the Configuration | Export page for download.

Employee Information

The screenshot shows the 'Employee Information' configuration page in the SimplyMerit system. The page has a dark blue sidebar on the left with a 'Configuration' menu. The main content area is titled 'Employee Information' and features a search bar with the text 'Search by employee ID, name, or email'. Below the search bar is a table with three columns: 'Employee', 'Title', and 'Employee ID'. Each row in the table represents an employee and includes an 'Edit Employee' link. A 'Need Help?' button is located at the bottom of the table.

Employee	Title	Employee ID	
Buzz Aldrin	Astronaut	3	Edit Employee
Neil Armstrong	Astronaut	4	Edit Employee
Scott Carpenter	Astronaut	5	Edit Employee
Gordon Cooper	Astronaut	6	Edit Employee
Charles Duke	Apollo 13 Backup Lunar Module Pilot	7	Edit Employee
John Glenn	Astronaut	8	Edit Employee
Gus Grissom	Astronaut	9	Edit Employee
Fred Haise	Apollo 13 Lunar Module Pilot	10	Edit Employee
Gene Kranz	Apollo 13 Flight Director	2	Edit Employee
James Lovell	Apollo 13 Commander	11	Edit Employee
Ken Mattingly	Apollo 13 Commander	12	Edit Employee
Thomas Paine	NASA Director	1	Edit Employee

Employee Information

The Employee Information tab enables the HR Administrator to modify employees within SimplyMerit. Employee Information can be sorted by the name of employees, title, or employee ID. There is a search function that allows an HR Administrator to search for employees based on their email, name, or employee ID. Basic employee information that can be edited includes first name, last name, date of birth, address, country, phone number, race, gender, education degree, degree date, and veteran status.

Job Information

The Job Information section of the Employee Information tab allows HR Administrators to change values such as an employee's company code, manager, manager's job level, title, job level, job class, department, division, and EEO category. Important dates that can be modified include hire and rehire dates and the number of years an employee has been at the company. Other information that can be modified in the Employee Information tab includes full-time/part-time status, weekly standard hours, FLSA status, wages, salary structure, pay frequency, pay per period, market data, and custom IDs.

If an employee has a value of "Yes" for the "Is Admin?" column, they will be granted the same elevated privileges as a SimplyMerit HR Administrator. The Enable Invitation setting will allow an invitation to be sent to an employee if they are a manager. Users can be locked out or regranted access to SimplyMerit by changing the value for "Lock out of App?".

Export

Configuration

Export Data

Merit Letters Bonus Letters Equity Letters Downloads Universal Data ADP Data Criterion Data Namely Data Trusac Data

Basic Employee Data - from Import

Export a CSV of your employees' basic data from employees already imported. This does not include merit or bonus allocation and is meant to be used before the planning cycle is complete. See "Final Employee Data" below for the complete dataset.

Recipient	Date	Status	File
Neil Morgan	4 days ago	Succeeded	Save to Computer
Neil Morgan	5 days ago	Succeeded	Save to Computer
Neil Morgan	5 days ago	Succeeded	Save to Computer
Neil Morgan	7 days ago	Succeeded	Save to Computer
Neil Morgan	7 days ago	Succeeded	Save to Computer
Neil Morgan	7 days ago	Succeeded	Save to Computer

START NEW EXPORT

Need Help?

The **Export** page is used to pull data and adjustment letters from SimplyMerit. Please note that you may export data and adjustment letters using the “All Merit/Bonus/Equity Letters” option as often as you would like as the export process does not set any flags or alter the data in any way.

Universal, ADP, Criterion, and Namely Data Tabs

Each of the different import sources has separate export sources on separate tabs. Choose the tab that aligns with your HRIS. “Universal” is the standard export format that provides you will all of the data from SimplyMerit. Please note that you may run a “Universal” export even if you are using ADP, Criterion, or Namely. This option may be used if you would like a comprehensive export of your data from SimplyMerit.

Additionally, you may run these exports at any time and as often as you like. SimplyMerit does not set any status or lock any features when the exports run. Rather, it simply builds and delivers the export files as described below.

The sections below apply to all of the HRIS export types listed above.

Basic Employee Data – from Import

This section allows you to export your basic data in the same data file format as what you used for the data upload. This export option is commonly used when numerous changes are required to your import data or to recover a lost import data file. Clicking the “Start New Export” button will start a background process to build your export file.

You will be able to directly monitor the progress by refreshing this page. SimplyMerit will also email you when the process has completed and will include a link to download the file to your computer. You may make changes to the exported data and re-import it as described in the above section entitled “Data Import.”

Final Employee Data

When the entire merit adjustment and bonus allocation cycles are complete, use this export option to extract your employee data along with the merit adjustments and bonus allocations. Clicking the “[Start New Export](#)” button will start a background process to build your export file. You will be able to directly monitor the progress by refreshing this page. SimplyMerit will also email you when the process has completed and will include a link to download the file to your computer. The export data file can then be used to feed updates back to your source HRIS and Payroll systems.

Recommended Process for Distributing Letters Through SimplyMerit

This is the recommended process to follow in order to distribute the adjustment letters to managers through SimplyMerit. These instructions focus on the Merit Letter constructs but should be extended to Bonus Letters and Equity Letters as needed:

1. Change configurations so that you are ready to send letters
 1. Config | System Control
 1. “Finalize Company” - Make sure that this is checked
 2. “Lock-Out Managers” - This should be **UN**checked
 3. “Lock SimplyMerit for Changes” - This should also be checked
 2. Validate the Letters – This can be done at any time
 1. Config | Export | Merit Letters tab
 1. “All Merit Letters” section - Click “Start New Export” to run a fresh batch of letters. Download the resultant zip file and check to make sure the letters are formatted correctly and showing the right information.
3. Approvals
 1. Config | System Control | Finalize Company - If you do not want managers with un-approved Merit submissions to be notified on the next step, **UN**check the Finalize Company checkbox.
 2. Config | Manager Activity - Click the “Approve All – Salary” button - This will make sure that all managers’ teams are in an approved state. Managers cannot access their letters until their team is in an approved state.
 3. Config | System Control | Finalize Company - Recheck this if you unchecked in step 3.1.1
4. Send Letters to Managers
 1. Config | Export | Merit Letters tab
 1. Click “Send to Managers” when you’re ready to send out the notification emails to managers. A sample of this email is available towards the end of this guide. The email contains a link to download their letters.

2. If the manager is logged into SimplyMerit, it will automatically download their team's letters. Otherwise, the link will take them to the login page, and they will have to go to their My Team | Salary page in order to click the "Download Team Letters" button.

Merit Letters

The Merit Letters tab provides the following options to manage generating, downloading, and distributing the merit adjustment letters.

All Merit Letters

When the entire merit adjustment cycle is complete, use this export option to generate a zip file containing all of your employees' merit adjustment letters. Clicking the "[Start New Export](#)" button will start a background process to build your zip file. You will be able to directly monitor the progress by refreshing this page. SimplyMerit will also email you when the process has completed and will include a link to download the file to your computer.

This option is also extremely useful when testing your letters as you may generate and download all of your employees' letters as often as you need.

Send Merit Letters to Managers

When the entire merit adjustment cycle is complete, use this option to send the merit adjustment letters to managers for their direct reports. The managers will receive an email containing a link back to SimplyMerit. On their My Team | Salary page, there will be a new "Download Team Letters" button.

Important Note! Please note that managers who have not had their Merit approved will **not** have access to the "Download Merit Letters" button. You may flip all managers to "Approved" status on the Config | Manager Activity page.

Bonus Letters

The Bonus Letters tab provides the following options to manage generating, downloading, and distributing the bonus allocation letters.

All Bonus Letters

When the entire bonus allocation cycle is complete, use this export option to generate a zip file containing all of your employees' bonus allocation letters. Clicking the "[Start](#)

New Export” button will start a background process to build your zip file. You will be able to directly monitor the progress by refreshing this page. SimplyMerit will also email you when the process has completed and will include a link to download the file to your computer.

This option is also extremely useful when testing your letters as you may generate and download all of your employees’ letters as often as you need.

Send Bonus Letters to Managers

When the entire bonus allocation cycle is complete, use this option to send the bonus allocation letters to managers for their direct reports. The managers will receive an email containing a link back to SimplyMerit. On their My Team | Bonus page, there will be a new “Download Bonus Letters” button.

Important Note! Please note that managers who have not had their Bonus approved will **not** have access to the “Download Bonus Letters” button. You may flip all managers to “Approved” status on the Config | Manager Activity page.

Equity Letters

The Equity Letters tab provides the following options to manage generating, downloading, and distributing the equity allocation letters.

All Equity Letters

When the entire equity cycle is complete, use this export option to generate a zip file containing all of your employees’ equity grant letters. Clicking the “Start New Export” button will start a background process to build your zip file. You will be able to directly monitor the progress by refreshing this page. SimplyMerit will also email you when the process has completed and will include a link to download the file to your computer.

This option is also extremely useful when testing your letters as you may generate and download all of your employees’ letters as often as you need.

Send Equity Letters to Managers

When the entire equity grant cycle is complete, use this option to send the equity grant letters to managers for their direct reports. The managers will receive an email containing a link back to SimplyMerit. On their My Team | Equity page, there will be a new “Download Equity Letters” button.

Important Note! Please note that managers who have not had their Equity approved will **not** have access to the “Download Equity Letters” button. You may flip all managers to “Approved” status on the Config | Manager Activity page.

Additional Important Notes!

How the letters are processed and sent to managers can be impacted by several settings within SimplyMerit. Specifically...

- Email notifications that the letters are ready will NOT be sent to managers who have “enable_invitation” set to “no” AND who have not previously logged into SimplyMerit.
- If you’ve elected not to provide all managers with access to SimplyMerit but you want them to be able to access their team’s letters, you will need to invite those managers into SimplyMerit in order for them to access their team’s letters. Inviting the managers can be accomplished in one of two ways:
 - On the Configuration | Manager Activity screen, you can click the “Send Invite” link next to each manager who has not yet been invited into SimplyMerit. These managers will be easily identifiable on the screen.
 - You can change the “enable_invitation” field on the data import file from “no” to “yes” for those additional managers and then reimport the file. Please note that you should take care to not load any values in fields that can be preloaded in order to avoid overwriting any of the work performed by managers in SimplyMerit. When in doubt, please contact us at support@simplymerit.com.
- Higher-level managers can access lower-level manager’s letters by clicking on the manager’s name (next to the blue “+” or “-” icon) on the My Org screen to navigate to that manager’s “My Team” page.
- “Finalize Company” – The “Finalize Company” checkbox on the Configuration | System Control screen will impact how the emails are distributed by SimplyMerit, including the Adjustment Letter emails.
 - If “Finalize Company” is UNCHECKED, all emails including the Adjustment Letter emails will be sent to the primary HR Administrator for SimplyMerit and not to the managers. This can be a useful technique if, as the primary HR Administrator, you want to see exactly what will be sent to the managers. If you wish to generate the letters but not notify managers, you can uncheck the “Finalize Company” checkbox on the Configuration | System Control page before clicking the “Send to Managers” button for the letters on the Configuration | Export page. SimplyMerit will generate the letters for all managers who have had their merit approved and add the “Download Team Letters” button on their My Team | Salary page, but the application will not send email notifications to managers.
 - If “Finalize Company” is CHECKED, then the managers will receive the Adjustment Letter emails.
- For whatever reason, should you need to update the information in the letters that the managers are downloading from SimplyMerit, follow these steps:
 - On Configuration | System Control, uncheck the “Finalize Company” checkbox and click “Submit.” This ensures that email notifications are not sent to managers.
 - On Configuration | Export, select the appropriate Letters tab and click “Send to Managers.” This will regenerate the letters within the application, which can take some time.

- Wait until the Primary HR Admin has received all email notifications about the letters being generated.
 - Reset the “Finalize Company” checkbox to its original setting.
- “Lock Company” – The “Lock Company” checkbox on the Configuration | System Control screen will directly impact the managers’ ability to access their Adjustment Letters.
 - If “Lock Company” is UNCHECKED, managers WILL be able to access SimplyMerit and to download their Adjustment Letters from their My Team screens.
 - If “Lock Company” is CHECKED, managers will NOT be able to access SimplyMerit and will not have access to their Adjustment Letters.

Downloads

This tab is where you will find any of the download files that you generated from either the My Org screen or the My Team screen.

Org Employee Data

See below, exports created from the “Download Org Employee Data” feature on the My Org page can be accessed here.

Generating My Org Employee Data Report

The screenshot shows the 'My Org' page for 'Claudine Pacocha's Organization' (Austin Tests Inc - CEO). The page includes a search bar, a 'Download Org Employee Data' button (highlighted with a red circle), and a table of employee data. Summary statistics for 'Claudine's Org' and 'Claudine Pacocha's Team' are also displayed.

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
Dallin Beier	£41.10/hr	4.00%	£1.64/hr	£42.74/hr	3.00%	£1.28/hr	£44.02/hr		0.00%	£0.00/hr	£44.02/hr	£0
Stephany Bernier	£91,050	4.00%	£3,642	£94,692	3.00%	£2,841	£97,533		0.00%	£0	£97,533	£0
Yvonne Dach	£16.19/hr	3.00%	£0.49/hr	£16.68/hr	0.00%	£0.00/hr	£16.68/hr		0.00%	£0.00/hr	£16.68/hr	£0
Austin Kellner	£22.06/hr	2.50%	£0.55/hr	£22.61/hr	3.00%	£0.68/hr	£23.29/hr		0.00%	£0.00/hr	£23.29/hr	£0
Laverne Nienow	\$47.35/hr	2.50%	\$1.18/hr	\$48.53/hr	3.00%	\$1.46/hr	\$49.99/hr		0.00%	\$0.00/hr	\$49.99/hr	\$0

Team Employee Data

See below, exports created from the “Download Team Employee Data” feature on the My Org page can be accessed here.

Generating My Team Employee Data Report

The screenshot shows the 'Austin Kellner's Team - Salary' page in the SimplyMerit interface. At the top right, there is a progress indicator for 'Total Merit Allocated' at 70.0% (\$5,231 / \$7,475) and buttons for 'SAVE AS DRAFT' and 'SUBMIT'. A red circle highlights the 'Download Team Employee Data' button in the top right corner of the table area. The table below lists three employees with their current and proposed salaries, merit percentages, and promotion amounts. A 'Total Allocated' summary table is located at the bottom right of the page.

Employee	Current Salary	Merit Percent	Merit Amount	Salary after Merit	Promotion Percent	Promotion Amount	Salary after Promotion	New Title	Other Percent	Other
Cristal Crooks	£85,486	2.00 %	£ 1,710	£ 87,196	3.00 %	£ 2,616	£ 89,811		0.00 %	£ 0
Berniece Effertz	€15.45/hr	2.00 %	€ 0.31	€ 15.76	0.00 %	€ 0.00	€ 15.76		0.00 %	€ 0.0
June Schuppe	£46.13/hr	3.00 %	£ 1.38	£ 47.51	3.00 %	£ 1.43	£ 48.93		0.00 %	£ 0.0

Total Allocated				
Merit	Promotion	Other	Lump Sum	Total
\$5,231	\$5,580	\$0	\$0	\$10,811

Trusaic Data

SimplyMerit has partnered with [Trusaic](#) to offer our customers the ability to generate and access Trusaic’s free and paid reports regarding pay equity. Trusaic’s PayParity reports can help an organization ensure their employees are receiving comparable compensation for their work. Pay equity can also help identify any differences in pay that can be explained by legitimate job-related factors including:

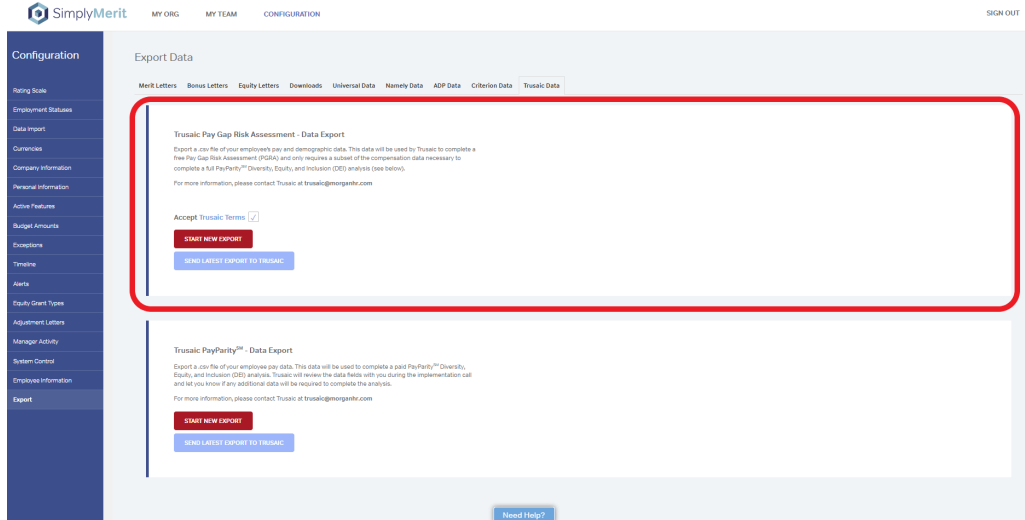
- Skills, Effort, Responsibility, Experience, Education, etc.
- Quality and Quantity of Production
- Location

Both the free and paid analyses provide you with two buttons:

- **“Start New Export”** – Click this button to generate a local copy of the export file for your review. This will show you exactly what information is generated and securely transmitted to Trusaic when you click the “Send Latest Export To Trusaic” button.
- **“Send Latest Export To Trusaic”** – Click this button to generate and securely transmit the export file to Trusaic. Trusaic will be notified so that that someone can establish contact with you and to provide more information about the process.

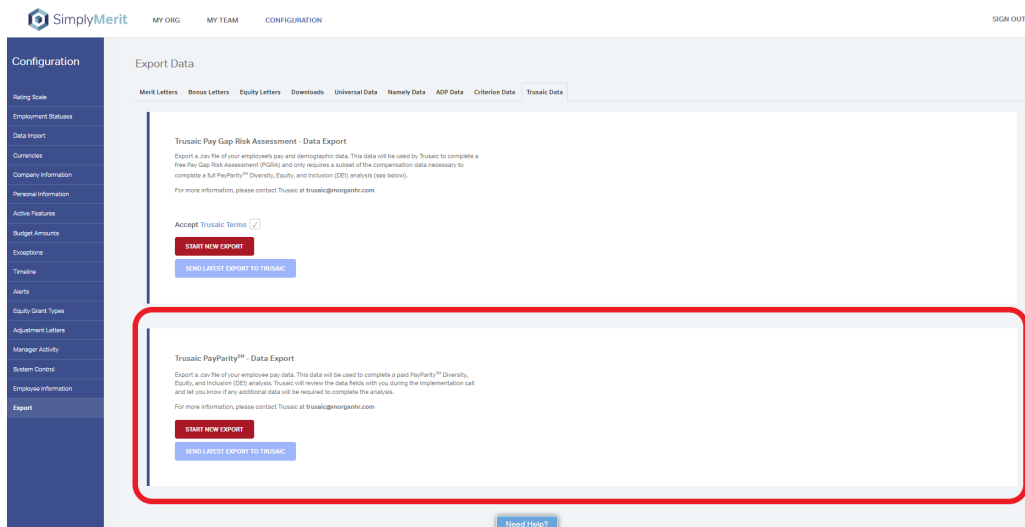
Trusaic Pay Gap Risk Assessment (Free)

The free Trusaic report generates a file that contains an organization's pay and demographic data that can be used by Trusaic to complete a free Pay Gap Risk Assessment (PGRA). The PGRA only requires a subset of the compensation data that is needed in comparison to [Trusaic's full PayParity report](#). Please note that Trusaic's Terms must be reviewed and accepted before a free PGRA report can be exported and sent to Trusaic.



Trusaic PayParity (Paid)

The paid Trusaic report provides a more complete PayParity Diversity, Equity, and Inclusion (DEI) analysis. Trusaic will review the data fields with you during an implementation call and inform you if any additional data is required to complete the analysis. For more information, please contact Trusaic at trusaic@morganhr.com.

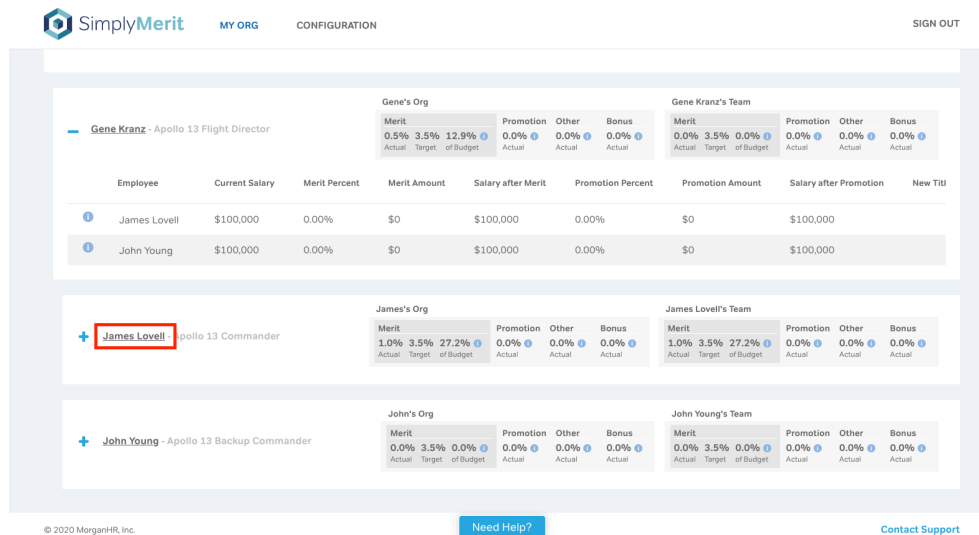


Additional Tips and Best Practices

Reversing an Approval

As the Administrator, the following steps will let you reverse a Merit, Bonus, or Equity approval in SimplyMerit:

1. On the My Org screen, navigate to the manager for whom you wish to reverse an approval and click on their underlined name next to the blue “ + / ” - “ icon to open that manager’s My Team screen



2. Click the Modify button
3. Click the Submit button
4. Click the Reject button and provide any instructions in the pop-up window followed by clicking Reject on the pop-up window. This will send an email to the manager letting him/her know that their submission has been rejected and that they can make changes and resubmit.

Leading Zeros in Data

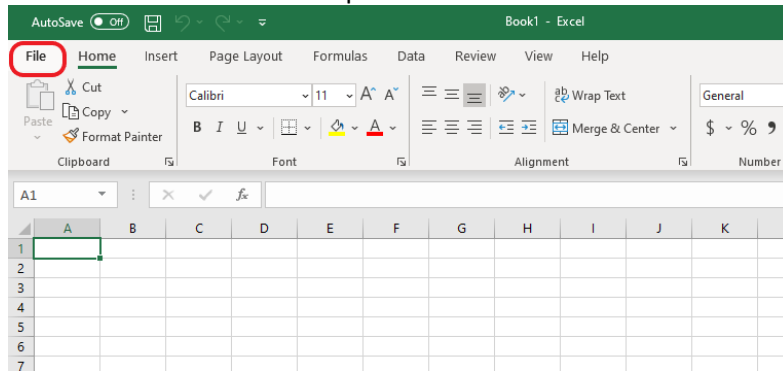
Data containing leading zeros (US Zip Codes are a good example) do not pose a problem within SimplyMerit. SimplyMerit accepts leading zeros on the data import, maintains leading zeros in its database, and exports leading zeros just fine.

The challenge is that Excel truncates leading zeros when OPENING CSV files. So, if you do any work with the CSV file in Excel before importing the data into SimplyMerit, you'll want to follow these best practices.

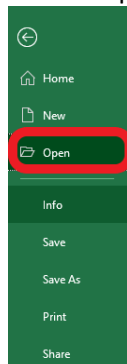
Best Practice: If you have leading zeros in EMP_ID and PARENT_EMP_ID fields, it is HIGHLY recommended that you prepend the ID values with a couple of alpha characters. For instance, an EMP_ID of "052342" should be changed to "GS052342" to eliminate the leading zeros from being truncated by Excel.

If you do need to work with a file that has leading zeros, the recommended approach is to IMPORT the file instead of OPENING the file. The following steps can be used to change the file extension from ".csv" to ".txt", which will trigger the import wizard in Excel.

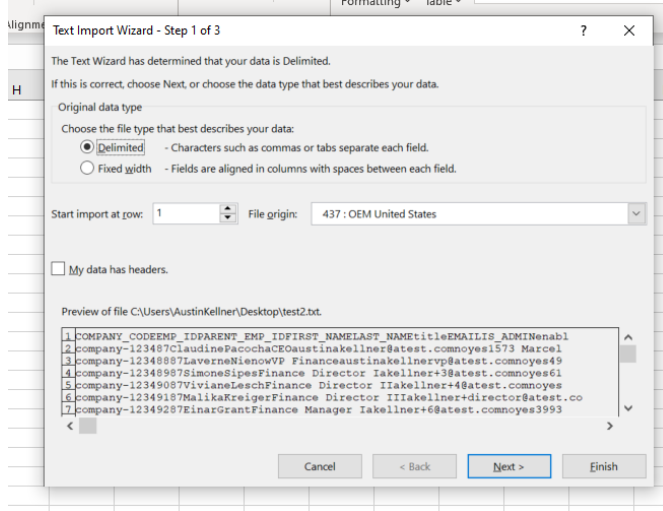
1. Rename the file extension from ".csv" to ".txt"
2. Select "File" in a new Excel spreadsheet



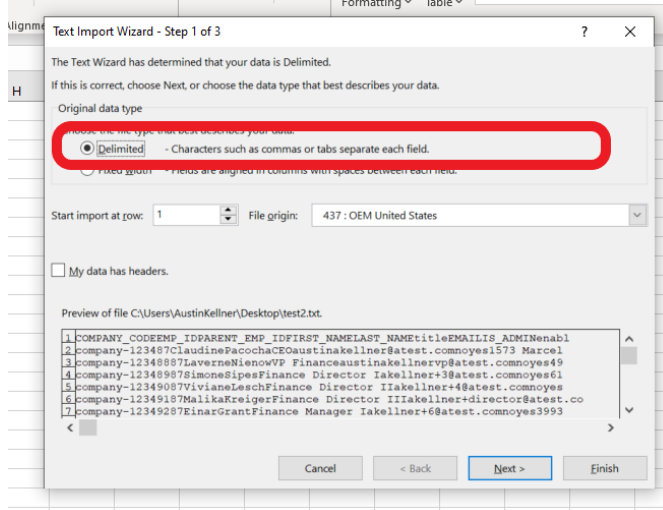
3. Select "Open" then locate the ".txt" file



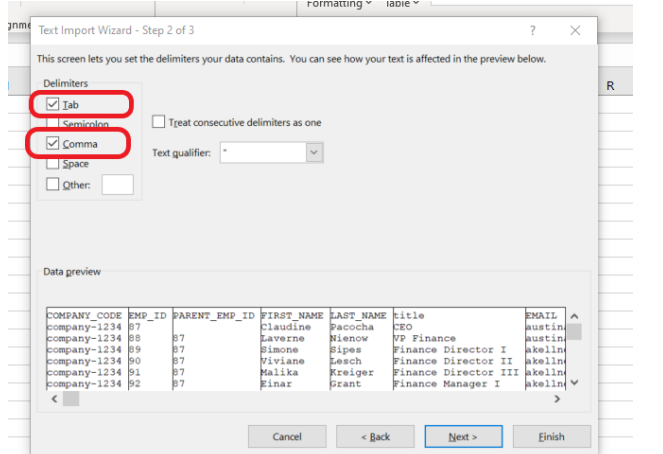
4. The Text Import Wizard will now appear if a .txt file was selected



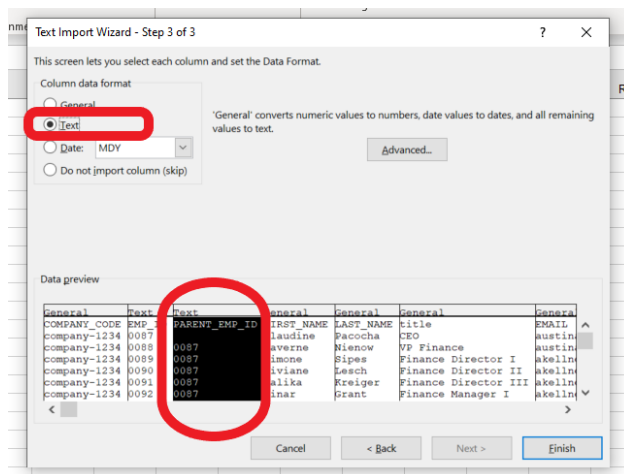
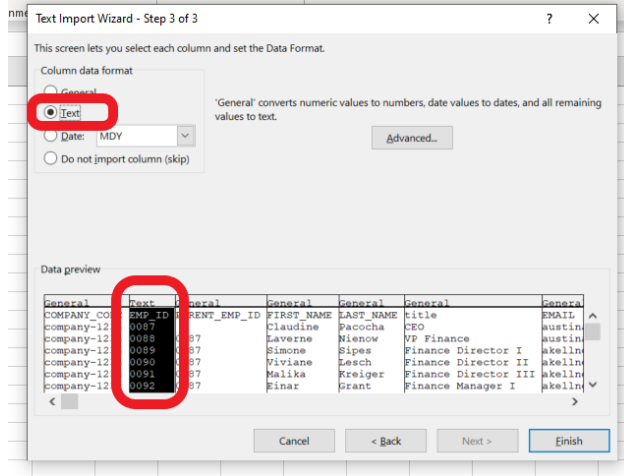
5. In Step 1, make sure that "Delimited" is selected



6. In Step 2, select "Comma" as the delimiter

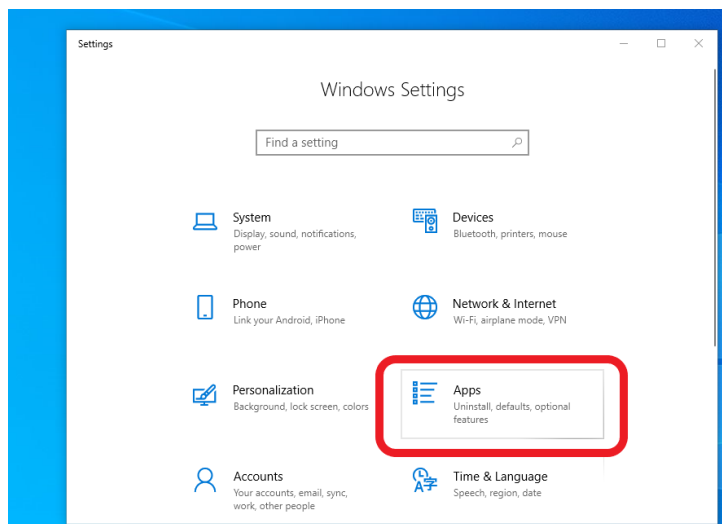
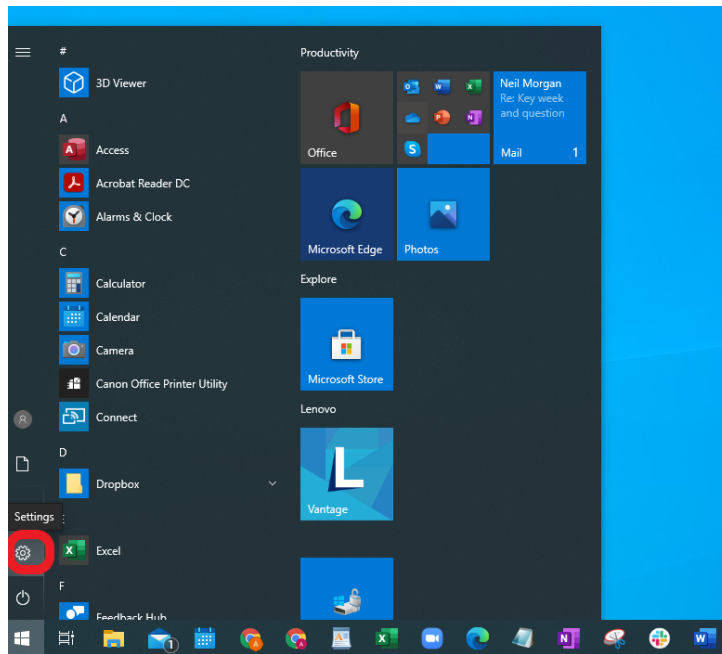


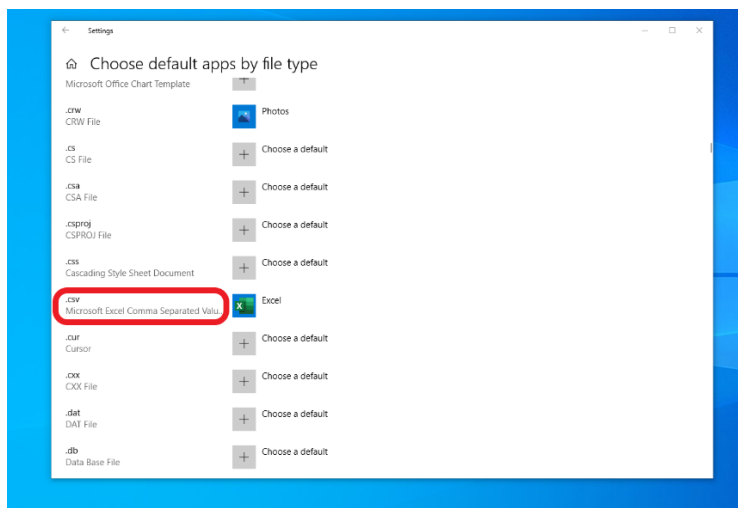
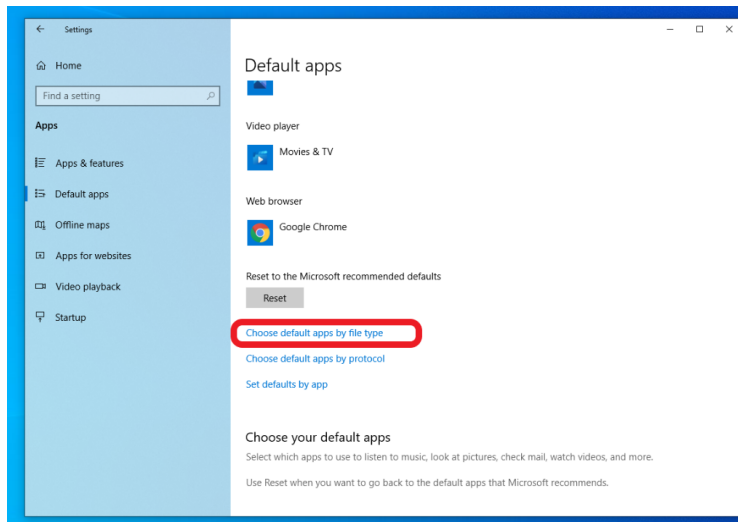
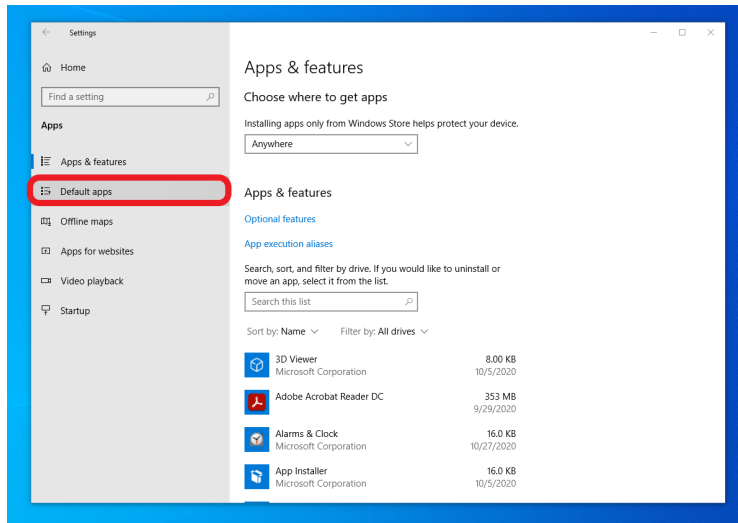
7. In Step 3, select any columns that need to maintain leading zeros and select "Text" below "Column data format" for each column

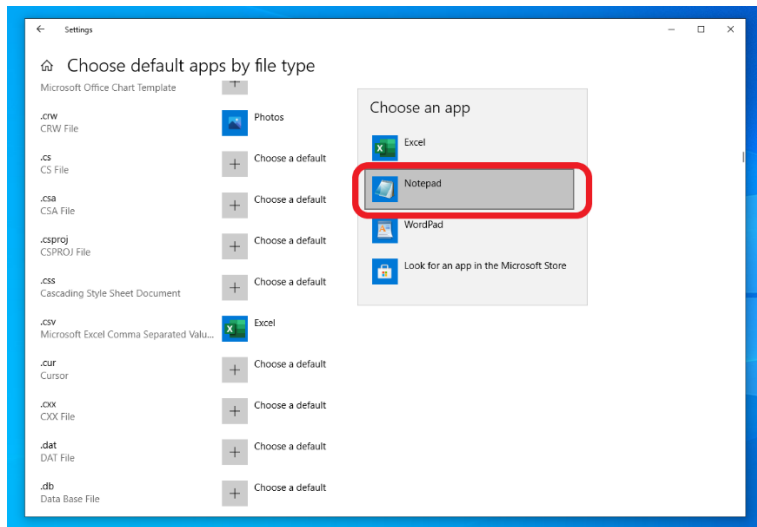
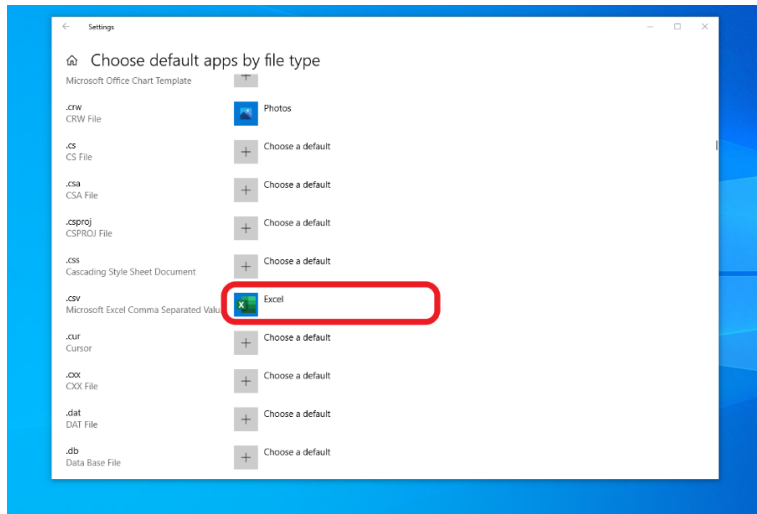


8. Click "Finish" to view your file in Excel

Best Practice: To avoid accidentally OPENING the CSV file in Excel, change the default application on your computer for “.csv” files.

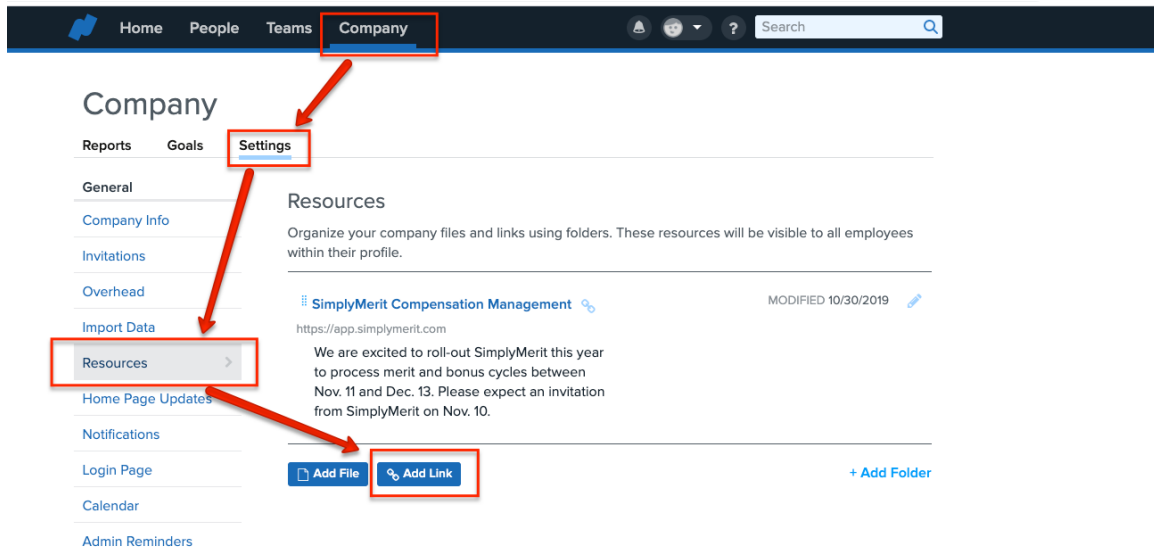






Namely Integration

SimplyMerit can be integrated directly within the Namely user interface by adding a link to the Resources menu within Namely. The following illustrates how to do this:



Additional Help

Integrated help is available by clicking the “Need Help?” button at the bottom of the screen.

The “[Help](#)” link at the bottom of the screen will take you to the MorganHR Help page for SimplyMerit. There you will find FAQs, Getting Started Guides, and short video help clips.

Clicking the “[Contact Support](#)” link at the bottom of the screen will create an email to the primary HR Administrator.

Reach out to support@simplymerit.com if you need to contact our Customer Success Team at any time. You may also reach us at 847.796.1530 x1.

All SimplyMerit Support Email Communications

SimplyMerit will send email notifications out to administrators and managers for a variety of activities. Administrators will receive notifications of import and export statuses.

Managers will receive notifications of pending approval requests as well as activity relating to the approval process, etc.

NOTE: Only managers with their “enable_invitation” field set to “yes” will receive these notification emails. If you wish to turn off notification emails to one or more managers, you may simply change their “enable_invitation” value to “no” either on the Configuration | Employee Information screen or through an import file if that’s easier. You may restore email communication to the managers by changing “enable_invitation” back to “yes.”

SimplyMerit Support Import Emails

Import Succeeded



Import Failed



SimplyMerit Support

• Import Failed



support@simplymerit.com
To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Austin,

Your import finished processing.
Status: **Import Failed with Errors**
Please review your errors here: [See Errors](#)

Best,
Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)

Invitation Instructions for User to Create a Password to Access SimplyMerit



SimplyMerit Support

Invitation instructions



support@simplymerit.com <support@simplymerit.com>
To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hello Simone Sipes,

Austin Tests Inc has selected the SimplyMerit application to guide you through your company's annual Merit Pay cycle. Click below to accept the invite.

[Accept invitation](#)

If you don't want to accept the invitation, please ignore this email. Your account won't be created until you access the link above and set your password.

Please contact Austin Kellner if you have any questions.

Best,
Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)

New Request for Approval



SimplyMerit Support

- New Request for Approval



support@simplymerit.com <support@simplymerit.com>
To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Laveme,


You have a new approval request awaiting your review: [Simone Sipes's Team](#)

Best,
Your SimplyMerit Team


[MorganHR](#) | [SimplyMerit](#) | [Contact](#)


Approved, Modified, and Rejected Request Messages



Approved Salary (Merit) Request

 **SimplyMerit Support**

• Your Request has been Approved

 **support@simplymerit.com** <support@simplymerit.com>
To:

 External images are now more secure, and shown by default. [Change in Settings](#)

Hi Simone,

Your approval request for Team Salary has been approved.
You can view your team's information [here](#).

Best,
Your SimplyMerit Team

MorganHR | [SimplyMerit](#) | [Contact](#)

Approved Team Bonus Request



SimplyMerit Support

Your Request has been Approved



support@simplymerit.com

To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Simone,

Your approval request for Team Bonus has been approved.
You can view your team's information [here](#).

Best,
Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)

Approved Team Equity Request



SimplyMerit Support

- Your Request has been Approved



support@simplymerit.com <support@simplymerit.com>
Tax

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Simone,

Your approval request for Team Equity has been approved.
You can view your team's information [here](#).

Best,
Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)

Modified Team Request



SimplyMerit Support

Your approval request has been modified



support@simplymerit.com
To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Einar,

Your approval request for Team Equity has been modified.
You can view [this change here](#).

Best,
Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)

Rejected with Reason Team Request



SimplyMerit Support

Your Request has been Denied



support@simplymerit.com <support@simplymerit.com>
To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Einar,

Your approval request for Team Salary has been declined.
Reason for denial: Too low.
You can resubmit your Team Salary [here](#).

Best,
Your SimplyMerit Team

MorganHR | SimplyMerit | [Contact](#)

Export Completed

 **SimplyMerit Support**

• Export Complete 

 **support@simplymerit.com** <support@simplymerit.com>
To:

 External images are now more secure, and shown by default. [Change in Settings](#)



Hi Austin,

Your export finished processing.

Status: **Export Succeeded**

You can download your export here: [Download Export](#)

Best,

Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)

Team Adjustment Letters Ready to Download



SimplyMerit Support

Team Merit Adjustment Letters



support@simplymerit.com <support@simplymerit.com>
To:

External images are now more secure, and shown by default. [Change in Settings](#)



Hi Claudine,

Your team's Merit Adjustment Letters are complete.
You can download them here: [Download Letters](#)

Best,
Your SimplyMerit Team

[MorganHR](#) | [SimplyMerit](#) | [Contact](#)