

Distributing Letters through SimplyMerit

This is the recommended process to follow in order to distribute the adjustment letters to managers through SimplyMerit.

1. Verify configurations so that you are ready to send letters in **Config | System Control**:
 - a. "Finalize Company" - This should be **checked**
 - b. "Lock-Out Managers" - This should be **UNchecked**
 - c. "Lock SimplyMerit for Changes" - This should be **checked**
2. Validate the Letters – This can be done at any time in **Config | Export | Merit Letters** tab | "All Merit Letters" section - Click **Start New Export** to run a fresh batch of letters. Download the zip file and check to make sure the letters are formatted correctly and show the right information.
3. Ensure all submissions are in an "Approved" state in **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. The **Approve All** buttons will **not** send notification emails to managers.
4. Ensure Managers Have Access - If you only invited some managers into the planning process and now want all managers to be able to access their team's letter, you'll need to invite the additional managers into the tool using the following steps:
 - a. "enable_invitation" – Set to "yes" for additional managers to be invited into the application. This can be done individually on **Config | Employee Information** or in bulk through an import file with just "EMP_ID" and "enable_invitation" columns.
 - b. Invite additional managers by clicking on the "Send Manager Invites" button on **Config | System Control**. SimplyMerit will send invitations only to those managers not previously invited into the application.
5. Send Letters to Managers in **Config | Export | Merit Letters** tab - Click **Send to Managers** when you're ready to send out the notification emails to managers. The email contains a link to download their letters.
6. When managers are logged into SimplyMerit they will go to their **My Team | Salary** page, then click the **Download Team Letters** button.
7. Managers may download team letters for other managers who report into their hierarchy by navigating to that manager on **My Org** and click that manager's name (underlined name next to blue / icon) to access that other manager's **My Team | Salary** screen and the **Download Team Letters** button.

These instructions are for Merit Letters and should be followed if using Bonus Letters and/or Equity Letters

Merit Letters

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

Configuration

Export Data

Merit Letters Bonus Letters Equity Letters Downloads Universal Data ADP Data Namely Data Trusaic Data

All Merit Letters

Export PDFs of all employees' merit letters.

START NEW EXPORT

Send Merit Letters to Managers

Send each manager their team's merit letters. **SimplyMerit will only send email notifications to each manager who has their adjustments approved in the application.** The email will contain a link back to SimplyMerit. If they happen to be logged into the application, it will automatically download the Zip file containing their employees' letters. Otherwise, they will be directed to the login page to log into the application and then may click on the new "Download Team Letters" button on their My Team pages.

SEND TO MANAGERS

Need Help?

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.

i 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

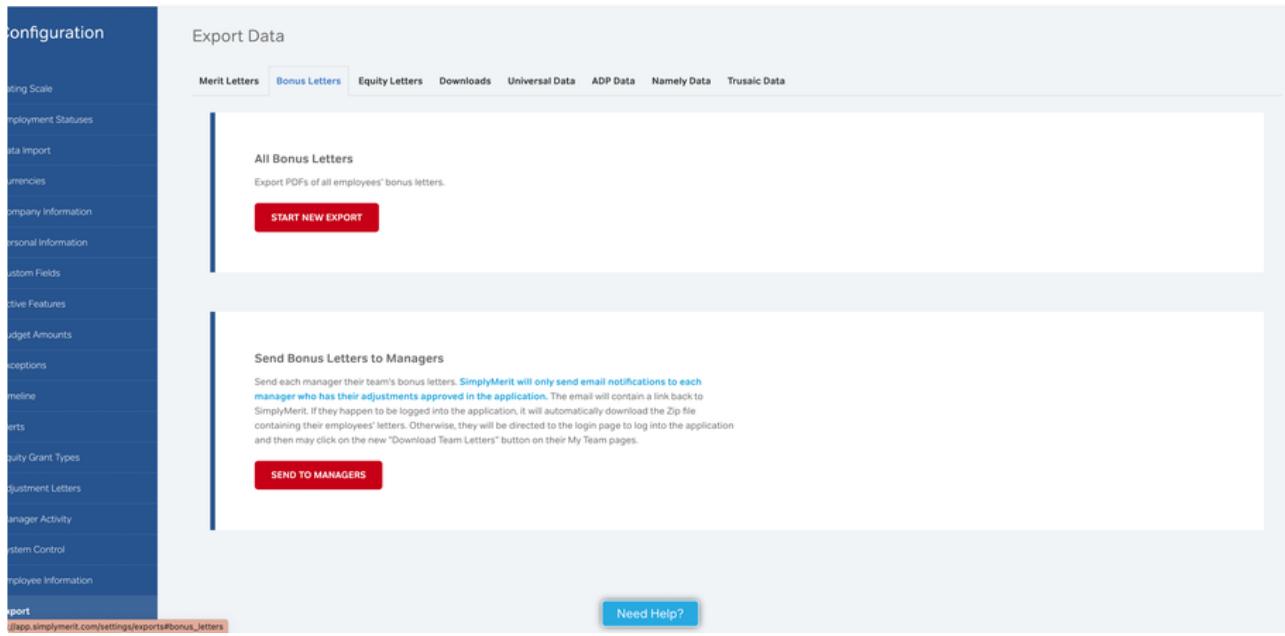
When the entire merit adjustment cycle is complete, use this option to send the merit adjustment letters to managers for their direct reports. The managers will receive an email containing a link back to SimplyMerit. On their **My Team | Salary** page, there will be a new **Download Team Letters** button.

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

! If you have individually locked out any managers, you must make sure to *unlock* those managers before they can receive letters.

Bonus Letters

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



Configuration

Export Data

Merit Letters **Bonus Letters** Equity Letters Downloads Universal Data ADP Data Namely Data Trusonic Data

All Bonus Letters

Export PDFs of all employees' bonus letters.

START NEW EXPORT

Send Bonus Letters to Managers

Send each manager their team's bonus letters. **SimplyMerit will only send email notifications to each manager who has their adjustments approved in the application.** The email will contain a link back to SimplyMerit. If they happen to be logged into the application, it will automatically download the Zip file containing their employees' letters. Otherwise, they will be directed to the login page to log into the application and then may click on the new "Download Team Letters" button on their My Team pages.

SEND TO MANAGERS

Need Help? https://app.simplymerit.com/settings/exports#bonus_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.

- i** 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 Team Letters** button.

- !** Please note that managers who have not had their Bonus approved will **not** have access to the **Download Team 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.

Configuration

Export Data

Merit Letters Bonus Letters Equity Letters Downloads Universal Data ADP Data Namely Data Trusonic Data

All Equity Letters

Export PDFs of all employees' equity letters.

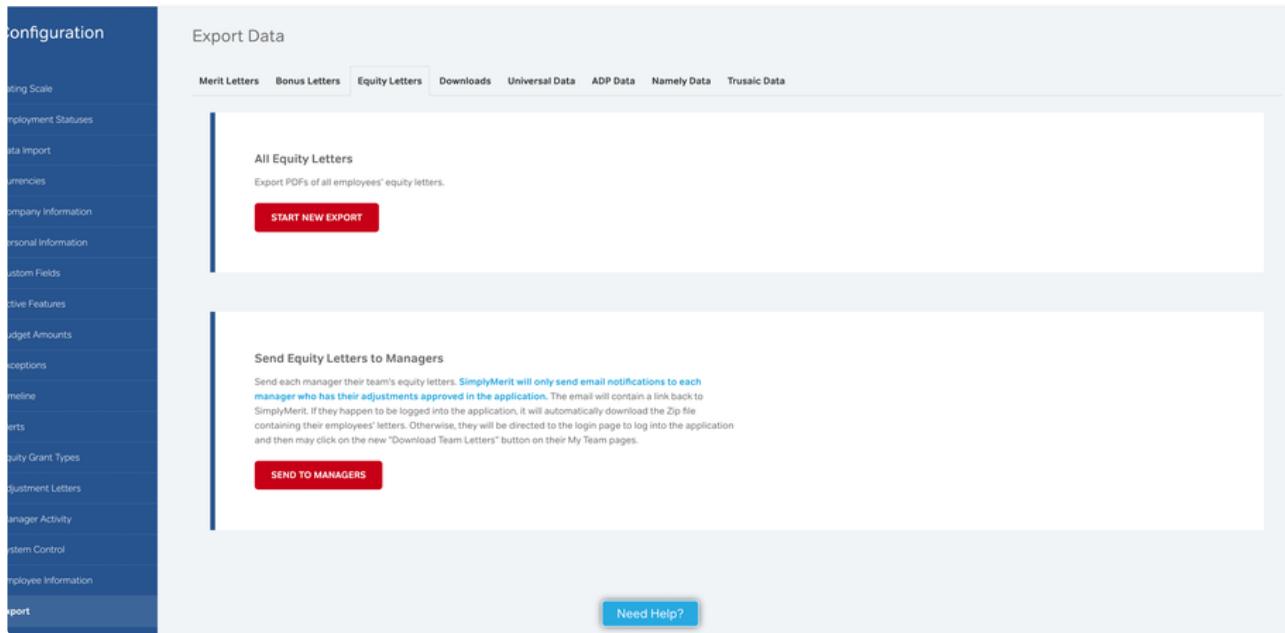
START NEW EXPORT

Send Equity Letters to Managers

Send each manager their team's equity letters. **SimplyMerit will only send email notifications to each manager who has their adjustments approved in the application.** The email will contain a link back to SimplyMerit. If they happen to be logged into the application, it will automatically download the Zip file containing their employees' letters. Otherwise, they will be directed to the login page to log into the application and then may click on the new "Download Team Letters" button on their My Team pages.

SEND TO MANAGERS

Need Help?



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.

- i** 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 Team Letters** button.

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