

Iowa Department of Human Services  
**Eval Merit Increase**

There are three main steps to adding a merit increase:

1. Evaluation Rating
2. Request Compensation Change Business Process
3. Update Next Increase Date

### 1. Evaluation Rating

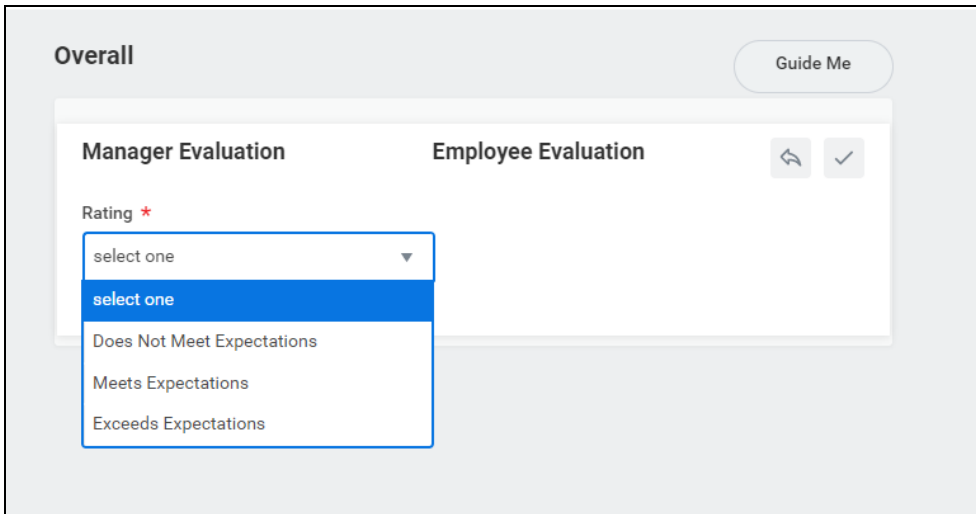
From the worker's **Profile**, use the **Actions** menu to select **Talent** and then **Start Performance Review**.



The screenshot shows a form titled "Start Performance Review for Employee". It contains four fields, each with a red asterisk indicating it is required:

- Employee**: A dropdown menu with a search icon (X) and a list icon (three horizontal lines). The selected item is redacted with a black box.
- Review Template**: A dropdown menu with a search icon (X) and a list icon (three horizontal lines). The selected item is "Performance Review".
- Period Start Date**: A date input field with a calendar icon, showing "02/22/2021".
- Period End Date**: A date input field with a calendar icon, showing "02/22/2022".

In the **Rating** dropdown menu, select the appropriate rating and then click **Submit**.



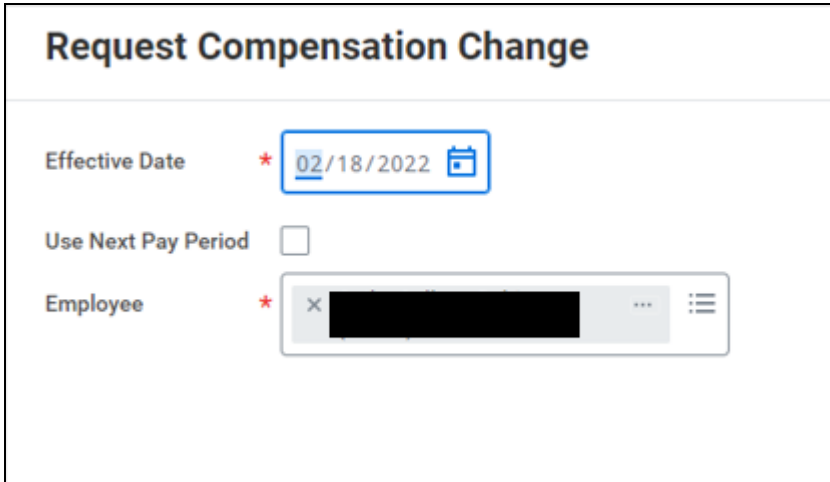
The screenshot shows the "Overall" section of the evaluation form. It includes a "Guide Me" button and two tabs: "Manager Evaluation" and "Employee Evaluation". The "Rating" field is highlighted with a blue border, and its dropdown menu is open, showing the following options:

- select one (highlighted)
- Does Not Meet Expectations
- Meets Expectations
- Exceeds Expectations

## 2. Request Compensation Change Business Process

Select the **Employee Profile** and then **Actions** then **Request Compensation Change**.

Note that Compensation Changes are not applicable for employees who are at maximum pay for their job class or temporary employees.

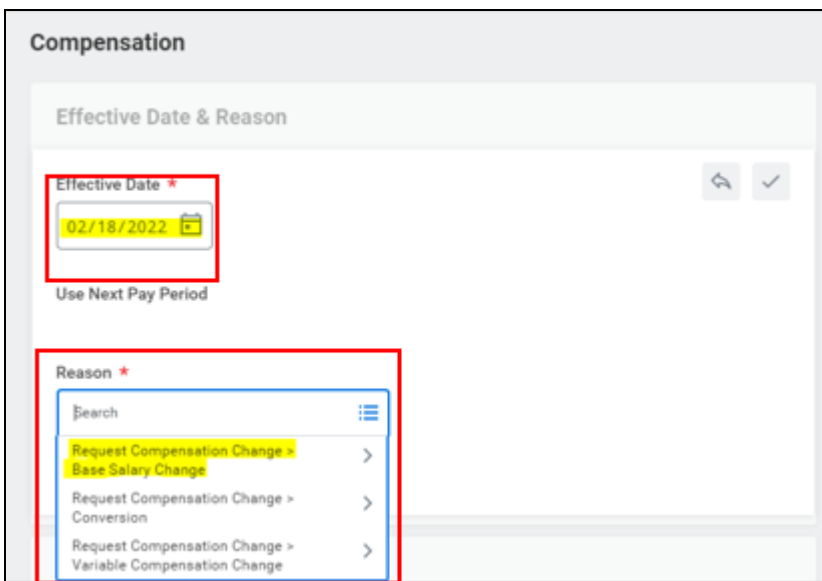


The screenshot shows a form titled "Request Compensation Change". It contains three main fields: "Effective Date" with a date picker set to 02/18/2022, "Use Next Pay Period" with an unchecked checkbox, and "Employee" with a search dropdown menu. The date and employee fields are marked with a red asterisk, indicating they are required.

Enter the **Effective Date** as the date employee was eligible for the merit increase. This **will** generate the back pay owed from previous pay periods if needed.

Click **Submit**.

Make sure the effective date is still correct, then use the **Reason** dropdown box to select **Base Salary Change**.



The screenshot shows the "Compensation" form with the "Effective Date & Reason" section highlighted. The "Effective Date" field is set to 02/18/2022 and is highlighted with a red box. The "Reason" dropdown menu is open, showing a list of options: "Request Compensation Change > Base Salary Change", "Request Compensation Change > Conversion", and "Request Compensation Change > Variable Compensation Change". The "Base Salary Change" option is highlighted with a yellow background and a red box.

Then, select **Merit** under the **Base Salary Change** choice.

The screenshot shows the 'Compensation' form with the 'Reason' dropdown menu open. The 'Reason' field is required. The dropdown menu lists several options, with 'Base Salary Change - Merit' highlighted in yellow. A red box highlights the 'Base Salary Change - Merit' option. The 'Effective Date' is set to 02/18/2022, and the 'Use Next Pay Period' checkbox is checked.

Under the **Compensation Plan**, select **Hourly**, and enter the **Percent Change** (1%, 2%, or 3%). Because the amount must be rounded to 2 decimal points, you may have to subsequently round the **Amount Change** value up or down.

The screenshot shows the 'Compensation Plan' section of the form. The 'Compensation Plan' is set to 'Hourly Plan'. The 'Total Base Pay Range' is 20.56 - 25.52 - 30.47 USD Hourly. The 'Amount' field is filled with 22.2666. The 'Amount Change' field is filled with 0.4366. The 'Percent Change' field is filled with 2.

The screenshot shows the 'Compensation Plan' section of the form. The 'Compensation Plan' is set to 'Hourly Plan'. The 'Total Base Pay Range' is 20.56 - 25.52 - 30.47 USD Hourly. The 'Amount' field is filled with 22.27. The 'Amount Change' field is filled with 0.44. The 'Percent Change' field is filled with 2.02.

Upload evaluation merit increase form and click **Submit**.

## Outliers

When an employee gets an evaluation of meets expectations (2%) or exceeds expectations (3%) but their pay grade tops out below that percentage:

Example:

The screenshot shows a 'Compensation Plan' form for an 'Hourly Plan'. The 'Total Base Pay Range' is highlighted in yellow and shows '20.56 - 25.52 - 30.47 USD Hourly', with '30.47' circled in red. The 'Amount' field is highlighted in yellow and contains '30.906', also circled in red. The 'Amount Change' field contains '0.606'. The 'Percent Change' field is highlighted in yellow and contains '2', circled in red. The 'Currency' is set to 'USD' and the 'Frequency' is set to 'Hourly'.

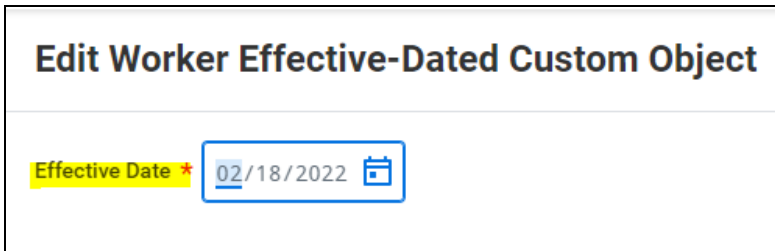
In these cases, edit the **Amount** field to the top (30.47 in this example)

### 3. Update Next Increase Date

Once approved by DAS, this alert will come to your Workday inbox:

The screenshot shows a Workday inbox with a 'Complete To Do' alert. The alert title is 'Complete To Do - Update Next Increase Date'. It is dated '24 second(s) ago - Effective 02/18/2022'. The alert is for an employee whose name is redacted. The overall process is 'Compensation Change' and the overall status is 'Successfully Completed'.

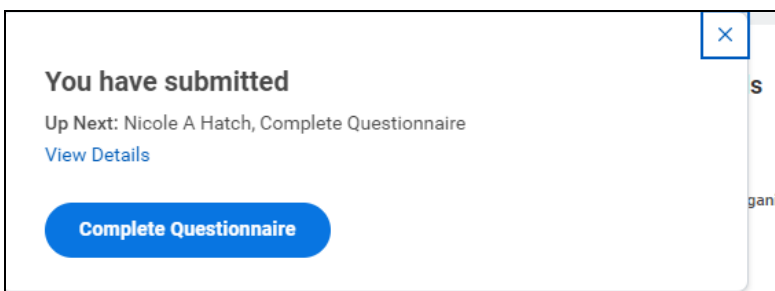
Navigate to the worker's **Profile**, then select the **Actions** menu, then **Additional Data**, then **Edit Worker Effective-Dated Custom Object**:



**Edit Worker Effective-Dated Custom Object**

Effective Date \* 02/18/2022

The **Effective Date** must match the date the evaluation was effective.



**You have submitted**

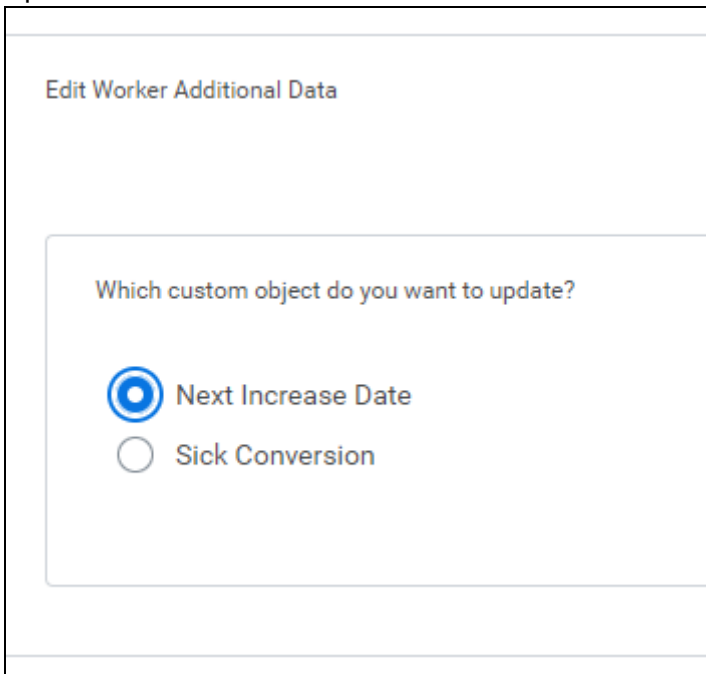
Up Next: Nicole A Hatch, Complete Questionnaire

[View Details](#)

**Complete Questionnaire**

Click **Complete Questionnaire**.

Update the **Next Increase Date**.



Edit Worker Additional Data

Which custom object do you want to update?

Next Increase Date

Sick Conversion

## Edit Additional Data Edit Worker Additional Data Event:

Custom Object Worker Next Increase Date

### Worker Next Increase Date

Next Increase Date \*  